EVALUATION OF PARTNERS OF THE AMERICAS
FINAL REPORT

Cooperative Agreement No. LAC-0793-A-00-1035-00

October 26, 1995

Presented to:
USAID/LAC/RSC/EHR

Presented by:
Marcy Kelley

DATEX, INC.
2101 Wilson Boulevard
Suite 100
Arlington, VA 22201

Evaluation Contract No. AEP-0085-I-00-2060-00, #14

Table of Contents

EXECUTIVE SUMMARY

Description of Partners of the Americas

Partners of the Americas is a private, nonsectarian, apolitical, nonprofit organization whose purpose is to promote economic development and self-help programs fostering friendship, communication and understanding among the peoples of Latin America, the Caribbean and the United States. Through long-term relationships, pairing states, cities and counties in the U.S. with countries throughout Latin America and the Caribbean, Partners of the Americas (POA) has developed unique cultural, technical and humanitarian exchanges forming a partnership network spanning the northern hemisphere.

POA was founded in 1964 to develop greater U.S. and Latin American citizen involvement in the Alliance for Progress and to promote better understanding of economic and social development through people-to-people activities. Since 1966, POA has been a separate legal entity and has received continuous support from the U.S. Agency for International Development (USAID) and other government agencies and private donors.

Today POA is a membership association spearheading 60 partnerships involving thousands of volunteers with an average annual budget of $7 million. All 120 chapters are legally incorporated nonprofit organizations with by-laws and letters of agreement and annual plans jointly developed between the northern and southern partner chapters. To be able to respond to the needs of this network, POA has developed policies and standards that broadly govern the functioning of each partner.

LAC Funding

Since 1964, POA has received funding from various offices in USAID as well as occasional grants and contracts from USAID Missions for in-country programs. The LAC Bureau Cooperative Agreement (CA) (and the subject of this evaluation) has provided resources to POA for partnership development activities as well as volunteer and staff travel and small grants. Since 1980, POA has received more than $9 million in funding from the LAC/EHR Bureau. These funds have been used to provide organizational development assistance and training to all the Partners. Today the CA is approximately one-tenth of the POA annual budget.

Purpose

The current Cooperative Agreement was signed in September 1991 (retroactive to May 1991) with a completion date of December 31, 1995. The purpose of this evaluation is to review past and current partnership activities supported by the annual USAID cooperative agreement and assess the extent to which POA has achieved the intended purpose.

This CA provides support to POA in order to strengthen its network of partnership organizations, improve its ability to achieve its objectives and further promote the development of indigenous

volunteer organizations in the LAC region. A specific objective of the agreement is the development of long-term planning mechanisms to benefit POA and the partnerships and assure that the development activities yield greater results.

The terms of the CA state that POA is to work toward achieving the stated purpose by improving its capacity to provide:

1. Technical assistance and training to its employees and its partnerships in the areas of planning, management, evaluation and self-financing;

2. Effective technical assistance from partnership volunteers in support of priority activities;

3. Greater access to small grants for community development;

4. Effective communications between POA and the partnerships; and

5. An effective monitoring and evaluation system for all levels of the organization.

These five critical areas were to be addressed through a series of targeted workshops and training programs over the life of the project, as well as administering a small grants program for development activities for the southern partnerships. Improvement in reporting and self-financing by the organization, consolidation of POA staff support for the partnerships, strengthening the regional centers and establishing appropriate and manageable program priorities for the five-year period were the projected outcomes.

Methodology

This evaluation took place during July 1995. A consultant was hired through the Datex, Inc. Monitoring and Evaluation IQC to carry out the evaluation. One week was spent in Washington interviewing POA and USAID staff and reviewing documents and other written materials. Two weeks were dedicated to visiting the southern partnerships of Ecuador, Brazil and Nicaragua and one week was spent visiting their northern chapters of Kentucky, Virginia and Wisconsin. Upon return, debriefings were held with POA and USAID and the remaining time was spent on report writing.

Guiding questions were used to interview the partnerships and an e-mail was sent to all the LAC Missions asking for their input on a short questionnaire. Nine responses were received.

POA staff traveled with the evaluator and commented on preliminary findings and the draft report.

Overall Conclusions

This cooperative agreement is an overly ambitious project that attempts to glue together too many disparate interventions in the name of partnership development. The resulting project is a clutter of training, technical assistance, travel and program grants that are not sustainable and do not necessarily lead to the fulfillment of the project purpose. This project design is likely the result of

the evolution of POA from USAID core funding to a cooperative agreement. The lack of focus on one or two clear programmatic areas has diluted the impact of the CA.

Despite an overall 11 percent budget cut, POA has met most of their projected EOPS as seen in the following table. Even though the EOPS were met, it has been difficult to show that the project purpose was accomplished. Correlating training, technical assistance and travel and program grants to a positive impact on the partnerships has not been possible.

POA has only partially met the project outcomes as described on the previous page. There has been improvement in reporting but not in self-financing. POA staff has been consolidated and responds effectively in support of the partnerships. The regional centers were not strengthened. In a consolidating and cost cutting effort, two of the three regional offices were closed. It is the view of this evaluation that appropriate and manageable program priorities were not established and this lack of concentrated focus has been a limitation to partnership and organizational development.

Status of Outputs and EOPS (through June 30, 1995)		
Outputs and EOPS	**Projected Targets**	**Actual Number**
Volunteer Travel Grants	720	429 (50-75 more projected)
Staff Partnership Interventions	100	98
Newsletters Published	26	17 (U.S.) 11 (Regional)
Small Grants	80	63 (10 more projected)
Project Planning/ Evaluation Workshops	28	26 (3 more planned)
Standards of Excellence and Rechartering	60 (all)	58
Multi-Year Partnership Plans	30 (50%)	35
Technical Assistance/ Small Grants in USAID/LAC Priority Areas	75%	100%
Partnership Chapters with Membership Base of more than 100	50%	55%
Partnerships with Partner City Programs	15	10

The CA was well managed but handicapped by a lack of creative leadership both within POA and at USAID Training opportunities lacked innovative approaches, workshops sacrificed in-depth technical content for breadth of topics, and follow-up and impact evaluation systems were only partially implemented at POA headquarters and not in the field.

Despite these difficulties, there are highlights. POA partnership representatives have been instrumental in providing continuity to partnerships and supporting them as they undertake new

programs and meet POA Standards of Excellence. The face-to-face interactions that have occurred at training workshops have also proved an enriching experience for both the northern and southern partnerships. Volunteer travel has been an invaluable training arena for both sides of the partnership, creating programs that build on the strengths of one partner adapted to the reality of the other. POA has been successful at raising other USAID funds to cover some of the CA program activities, particularly democratic initiatives and agriculture.

In-kind contributions play an important role to the CA and to POA as a whole. As a volunteer organization, all labor is free of charge, and local board, lodging and transportation are generally donated. There is a two to one matching contribution in service and materials on the small grants and when the chapter administrative costs are calculated, the CA has generated a four to 1 in-kind contribution of roughly $13 million.

The termination of core grant funding at this moment would be an overall 10 percent budget cut for the organization. They have not developed alternative funding sources for partnership development activities. Their programs would be negatively affected.

Overall Recommendations

Many challenges remain for POA in view of limited future funding. POA management must focus on one or two priorities for both headquarters and partnerships and invest their resources in achieving these priorities.

This evaluation recommends that, during the next few years, POA focus on replacing cooperative agreement funding with a fee for service strategy in order to reach a certain modicum of self-financing. However, they would need bridge funding to investigate opportunities for on-going, fee for service activities and intensive training for chapters to select and review potential options. As funding from headquarters diminishes, chapters also need training that focuses on identifying funders and grant/proposal writing.

The most cost effective way to reach the largest number of partnerships would be through exploiting distance learning as a training tool. This would open up training opportunities to a larger volunteer network at a lesser cost than bringing groups together. After the initial development cost, courses can be used again and again.

If AID is willing to fund this effort, POA needs guidance. They need to know what is happening in the field of distance learning and they need to familiarize themselves with the experience of other NGOs that have fee for service enterprises. They must hire qualified specialists in training and small business initiatives (fee for service enterprises) and the institution must be committed to focusing on this endeavor.

Specific Conclusions and Recommendations

A. **Strategic Objective 1 -- Technical assistance and training to staff and partnerships in planning, management, evaluation and self-financing**

Conclusions.

Regional training forums attempted to accomplish too much in too short of a time. They reached too few people to impact the partnerships.

Focused training (such as the President/Executive Directors Workshop) is more effective. The impact is immediate as many concrete actions are undertaken when volunteers return to their chapters.

Staff training for partnership representatives has proved important. Partnership reps carry out an integral function in the partnership/headquarters communication.

Training did not effectively deal with self-financing during this cooperative agreement.

Regional offices proved to be an expensive infrastructure to maintain with CA funds. Two of the three offices were closed. The third, Brazil, is unable to move beyond servicing local grants to provide leadership to their constituents. However, it has received negligible funds from the CA.

Recommendations.

Distance learning should be exploited as a training tool. This would open up training opportunities to a larger volunteer network at a lesser cost.

More emphasis needs to be placed on the technical content of training, specifically self-financing, with emphasis on experiential learning methodologies.

Partnership representatives should be supported in whatever way possible (training, travel funds and such) so as to continue their invaluable work.

Incentive structures need to be implemented to encourage partnerships to raise their own funds.

The evaluation supports the POA headquarters decision to curtail spending of CA funds in support of the regional office structures.

B. **Strategic Objective 2 -- Technical assistance from partnership volunteers in support of priority activities**

Conclusions.

Travel EOP was not met because POA was effective in finding other sources of funding.

This has been an Important source of training and updating for volunteers.

Although the evaluation lacked a formal and systematic way to measure impact of volunteer technical assistance, the anecdotal testimony is convincing.

Recommendations.

Impact can be measured by designing and completing a one page form at various intervals after the travel.

CA monies for volunteer travel should be limited to partnership development activities.

C. **Strategic Objective 3 -- Small grants for community development**

Conclusions.

Partnerships sometimes lack experience in the programmatic area of a small grant request.

Forms to gather baseline data exist but have not been consistently used to measure impact.

Recommendations.

Priority for small grants should be given to partnership development activities.

The criteria for awarding small grants should evaluate volunteer competence and experience in the given programmatic area.

Incentives should be developed that would encourage partnerships to measure and report on impact.

Impact can be measured by designing and completing a one page form at various intervals after finishing the program grant.

D. **Strategic Objective 4 -- Effective communication between POA and partnerships**

Conclusions.

Advances in communication through fax and e-mail have had a positive effect on

partnerships.

Partnerships value the POA publications and feel that it is important to publish their own as well.

There is tremendous growth potential in electronic communications.

Recommendations.

In an effort to focus the CA, funds for publications should come from other sources.

The cost effectiveness of investing in hooking up all chapters by e-mail should be investigated. This can also be exploited for distance learning.

E.   **Strategic Objective 5 -- A monitoring and evaluation system for all levels of the organization**

Conclusions.

POA has developed a management information system for headquarters use.

The ability to measure the impact of the CA has been difficult and subjective because the evaluation system is not operational.

An evaluation and impact system is not used by the field although the tools have been developed.

Recommendations.

Incentives need to be developed that would encourage the field to monitor impact information on travel and small grants.

Cooperative Agreement Management

Conclusions from Previous Evaluations

▸   POA has institutionalized most of the previous recommendations but more needs to be done.
▸   Particular emphasis needs to be placed on focusing on fewer activities.

Recommendations from Previous Evaluations:

▸   POA must focus on developing self-financing (fee for service) income to replace core funding by the year 2000.

POA Management

Conclusions

▸ While the CA has been well managed, it has lacked innovative leadership.

▸ Budget cuts have had a positive influence on streamlining the efforts of CA staff and trimming nonessential program spending.

Recommendations

▸ POA management needs to support their generalist staff with technical specialists (as done for the design of the M&E system) in training, curricula development and feasibility studies for fee for service activities.

Finance and Administration

Conclusions

▸ Funds have been well managed.

▸ POA has surpassed the staff targets established by USAID At the current level of activity, staffing is at the minimum possible to manage and implement the CA.

Recommendation

▸ POA should continue its meritorious efforts in streamlining program costs and financial tracking and reporting.

USAID Backstopping

Conclusions

▸ The project was not well designed and attempted too much.

▸ USAID could have been more involved in providing needed input and guidance.

Recommendations

▸ Another program would place responsibility on POA and partnerships to generate funds for partnership development activities.

▸ If more funds are forthcoming, USAID needs to work closely with POA to develop a focused program on fundraising and fee for service strategies.

▸ POA would be better served being backstopped from an USAID bureau or office that could provide more technical input.

SECTION 1 -- BACKGROUND

1.1 Description of Partners of the Americas

Partners of the Americas is a private, nonsectarian, apolitical, nonprofit organization whose purpose is to promote economic development and self-help programs fostering friendship, communication and understanding among the peoples of Latin America, the Caribbean and the United States. Through long-term relationships, pairing states, cities and counties in the U.S. with countries throughout Latin America and the Caribbean, Partners of the Americas (POA) has developed unique cultural, technical and humanitarian exchanges forming a partnership network spanning the northern hemisphere.

POA was founded in 1964 to develop greater U.S. and Latin American citizen involvement in the Alliance for Progress and to promote better understanding of economic and social development through people-to-people activities. Since 1966, POA has been a separate legal entity and has received continuous support from the Agency for International Development (USAID) and other government agencies and private donors.

Originally called the National Association of the Partners of the Americas (NAPA), since 1994 POA merged its American and NAPA boards to become one international board and is officially known as Partners of the Americas, Inc. (POA). The Board of Directors is made up of 20 members; 8 from the southern partnerships (3 from Brazil, 2 from Spanish-speaking South America, 1 from the Caribbean, 1 from Central America and 1 from Mexico), 8 U.S. members and 4 executive officers - 2 from Latin America and 2 from the U.S.

Today POA is a membership association spearheading 60 partnerships involving thousands of volunteers with an average annual budget of $7 million. All 120 chapters are legally incorporated nonprofit organizations with by-laws and letters of agreement and annual plans jointly developed between the northern and southern partner chapters. To be able to respond to the needs of this network, POA has developed policies and standards that broadly govern the functioning of each partner.

1.2 Partners 2000 and the Standards of Excellence

Partners 2000

Since 1980, the Board of Directors, chapter leaders, volunteers and staff have invested much of their time and efforts in the development of multi year, long range plans. These planning processes articulate the organizational strategy and provide the principles by which each partnership carries out their programs and organizational development efforts.

The present plan, Partners 2000 (developed during the 25th anniversary of POA in 1989), is a guide for POA as it evolves and accepts new challenges. It endorses both program and organizational goals. The program goals are for agriculture and rural development, culture, economic development,

education, emergency preparedness, health, natural resource management, rehabilitation, women and families and youth. The organizational goals include strengthening partnerships, growth, membership recruitment, leadership development, communications, public relations and resource development. It is currently being revised and updated through a year-long "strategic reassessment" process.

Standards of Excellence

In 1984, the POA Board adapted the Pursuit of Excellence Plan. Standards of Excellence are the guidelines used to measure the overall effectiveness of each Partner and to strengthen the organizational structure, communications and program development practices. The program includes five requirements which each partner committee must fulfill to be a federated member of POA. These requirements include:

▸ Partner committees must be incorporated and/or have legal status as a nonprofit organization;
▸ Each Partner committee must have a constitution and/or by-laws;
▸ All partnerships must have a jointly worked out and agreed upon annual plan which is the product of an annual meeting of the chairpersons or their designees;
▸ All partnership committees are required to have a policy for minority group participation; and
▸ All Partner committees are required to have a letter of understanding with their counterparts approved by both governing bodies and signed by both Partner presidents/chairpersons, with the understanding that it will be reaffirmed annually with or without modification.

1.3   LAC Funding

Since 1964, POA has received funding from various offices in USAID as well as occasional grants and contracts from USAID Missions for in-country programs. The LAC Bureau Cooperative Agreement (CA) (and the subject of this evaluation) has been uniquely instrumental in providing resources to POA for partnership development activities as well as volunteer and staff travel and small grants. Since 1980, POA has received more than $9 million in funding from the LAC/EHR Bureau. These funds have been used to develop the network of partnerships and to provide organizational development assistance and training to all the Partners. Today the CA contributes to approximately one-tenth of the POA annual budget.

1.4   Programmatic Areas

Current POA programs and funding focus on the following areas.

USAID

Emergency Preparedness Program is a cooperative agreement between Partners and OFDA to prevent loss of life and economic damage resulting from man-made and natural disasters. The program is being implemented in schools and strengthens the capacity of local NGOs for disaster preparedness.

Farmer-to-Farmer is an USAID cooperative agreement to improve the effectiveness of farming in seven target countries and to promote volunteerism and private citizen involvement as a means to address local development needs by targeting farmers and agricultural organizations. This grant is funded though the Office of Food and Voluntary Cooperation.

Democratic Initiatives is a regional project to strengthen existing or nascent foundations of democracy in Latin America and the Caribbean by promoting democratic skills and values as well as by increasing citizen participation in the political process. Increasing the participation of women by targeting women-led organizations and organizations where women are the primary beneficiaries is also a project goal. The funding comes from the Democratic Initiatives Office in USAID

Partners Reach Out is a cooperative agreement to increase U.S. public awareness and understanding of the economic and social development needs facing Latin America and the Caribbean. It is funded through the Development Education program at USAID

World Bank

The World Bank offers small grant funding for local NGOs working in family planning and reproductive health as well as those that support the linkages between declining fertility and education, women's status and maternal/child health. The World Bank is especially interested in supporting Caribbean NGOs.

USIA

USIA funding is used to strengthen institutional linkages, foster democratic values, increase citizen participation and share cultural traditions. Funds are available for travel grants, teacher and artist in residencies and project assistance grants to support cultural and educational activities.

W. K. Kellogg Foundation

The Fellowship in International Development funds emerging leaders throughout the western hemisphere. The program is designed for individuals at a mid-career point in their professional development who demonstrate interest in community service and international affairs and have a potential for leadership. Through a two and one-half year intermittent program, fellows are encouraged to take leadership roles in Partners programs, their communities and countries.

William and Flora Hewlett Foundation

Resources for technical exchanges, training and project assistance are available to support community-based activities addressing family planning, adolescent pregnancy, sex education and other projects addressing population issues.

Partners of the Americas Foundation

Each year the POA Foundation awards a limited number of grants to strengthen the partnerships and

assist them in maintaining Partners Standards of Excellence. These grants may be used to support fundraising projects, membership drives, the development of a newsletter and other communications.

Alfred Jurzykowski Foundation

Limited funds are available to all Brazilian partnerships to provide technical assistance to professionals and institutions working to combat domestic violence and sexual abuse of women and children and to support a project that trains women in income generating skills.

W. K. Kellogg Foundation, Asgrow Seed Company and Bentley Seed Company

Vegetable and flower seeds are available to improve nutrition, increase food security and augment income generating opportunities for families. Funds are available to cover the purchase and transportation of seeds and to support related activities.

Moriah Fund

Resources for technical assistance and small grants are available to support community-based activities addressing family planning, adolescent pregnancy, sex education, male responsibility in family planning and other projects addressing population issues.

SECTION 2 -- PURPOSE OF THE EVALUATION

2.1 Purpose

The purpose of this evaluation is to review past and current partnership activities supported by the annual USAID cooperative agreement and assess the extent to which POA has achieved the intended purpose. The current Cooperative Agreement was signed in September 1991 (retroactive to May 1991) with a completion date of December 31, 1995. This CA provides support to POA in order to strengthen its network of partnership organizations, improve its ability to achieve its objectives and further promote the development of indigenous volunteer organizations in the LAC region. A specific objective of the agreement is the development of long-term planning mechanisms to benefit POA and the partnerships and assure that the development activities yield greater results.

The terms of the CA outline the five (5) strategic objectives. It states that POA is to work toward achieving the stated purpose by improving its capacity to provide:

1. Technical assistance and training to its employees and its partnerships in the areas of planning, management, evaluation and self-financing;
2. Effective technical assistance from partnership volunteers in support of priority activities;
3. Greater access to small grants for community development;
4. Effective communications between POA and the partnerships; and
5. An effective monitoring and evaluation system for all levels of the organization.

These five critical areas were to be addressed through a series of targeted workshops and training programs over the life of the project, as well as administering a small grants program for development activities for the southern partnerships. Improvement in reporting and self-financing by the organization, consolidation of POA staff support for the partnerships, strengthening the regional centers and establishing appropriate and manageable program priorities for the five-year period were the projected outcomes.

2.2 Methodology

This evaluation took place during July 1995. A consultant was hired through the Datex, Inc. Evaluation IQC to carry out the evaluation. One week was spent in Washington interviewing POA and USAID staff and reviewing documents and other written materials. Two weeks were dedicated to visiting the southern partnerships of Ecuador, Brazil and Nicaragua and one week was spent visiting their northern chapters of Kentucky, Virginia and Wisconsin. Upon return, debriefings were held with POA and USAID and the remaining time was spent on report writing.

Guiding questions were used to interview the partnerships and an e-mail was sent to all the LAC Missions asking for their input on a short questionnaire. Nine responses were received.

POA staff traveled with the evaluator and commented on the preliminary findings and draft report.

SECTION 3 -- THE STRATEGIC OBJECTIVES

3.1 Strategic Objective 1 -- Technical Assistance and Training to Staff and Partnerships in Planning, Management, Evaluation and Self-financing

3.1.1 Introduction

Addressing recommendations from the 1990 evaluation, this cooperative agreement proposed to provide training and project development resources to strengthen the institutional capacity of POA and improve the organization and project delivery capability of the partnerships. Funding was also available to strengthen partners' regional offices to improve their capability to carry out programs which met Partners' goals and complement the longer term strategies of USAID

This strategic objective is complex due to the diversity of various formal and informal training modalities, audiences and technical content. Its importance is critical because of its potential to strengthen the partnerships. To better examine the impact the following discussion has been divided into four areas 1) training modalities; 2) staff technical assistance; 3) technical content; and 4) self-financing. Each area contains findings, conclusions and recommendations.

3.1.2 Training Modalities

Findings

The different modalities for training include:

- ▶ regional workshops focusing on partnership and program development;
- ▶ Washington, D.C.-based workshops for Presidents and Executive Directors;
- ▶ a one-day leadership forum at the International Convention;
- ▶ intermittent staff training; and
- ▶ regional offices.

Each year one of the regions has been highlighted for organizational and program development training. **Regional workshops** have been conducted in the five regions. The first year two workshops were held in Grenada and New York for the Caribbean partnerships, the second year a joint north-south workshop was held in Panama for the U.S.- Central American partnerships. Two joint workshops were held the third year; one in Ecuador and one in Bolivia. Two workshops were also conducted during the fourth year for the U.S.- Brazilian partnerships; one in Recife and one in Sao Paulo. The fifth year workshop was for the U.S.- Mexico partnerships. The topics covered included long range planning and evaluation, local resource development and key program areas.

At the regional workshops, participants from both the northern and southern partnerships attend and are required to travel together back to the southern partnership chapter to continue program and partnership development activities during a second week.

The D.C.- based **President/Executive Director workshops** gather executive officers from both sides of the partnership. These workshops provided an overview of the POA mission and strategies. For many participants, it was the first time that they understood the complexity of POA and the range of activities that it implemented. It is viewed as an indispensable tool providing the necessary skills and information to carry out the responsibilities of the respective positions.

The President of the Santa Catarina chapter attended the President/Executive Directors training in April 1995. He had been on his local board for six years (four years as Vice-president and 2 years as Executive Director) and learned more about POA than he could have imagined. The workshop gave him a global vision of Partners and provided a wealth of information on fundraising and program possibilities as well as a new appreciation of the Standards of Excellence program. Since returning to Santa Catarina, he has developed a data base of persons who have participated in Partners activities since 1985 and has drafted a letter updating them on partnership activities and encouraging them to reactivate their interest and membership in the partnership. The Executive Committee has started reviewing the by-laws which had not been updated since 1967.

All **staff** participated in 5 different **training sessions** with topics covering partnership development, training, the logical framework, gender analysis, and conflict resolution. These annual sessions took place at two staff retreats or at one-day in-house meetings. Various other sessions with staff covered project planning and representatives orientation. These took place at the POA office.

The **International Convention leadership forum** is an annual forum that takes place one day before the annual convention. With more than 75 participants at the session, it focuses on current topics of discussion and interest within POA.

The following table summarizes the volunteer and staff training carried out as part of the CA-funded activities.

Table 1 Volunteer and Staff Training 1991 - 1995		
Training	**Number of Trainings**	**Number of Participants**
Regional Workshops	8	357
President/Executive Directors Workshops	5	153
International Convention Leadership Forum	5	405
Staff Training (Some staff attended more than 1 training)	5	108
TOTAL	**23**	**1,023**

Regional offices were perceived as one of the vehicles for carrying out training, technical assistance and follow-up during this cooperative agreement.

At the time the cooperative agreement was signed, POA had regional offices in Brasilia, Bogota and

Bridgetown. Funding was earmarked for training to regional staff and to provide resources for the regional offices to use in carrying out partnership strengthening activities. Initial emphasis was placed on the Bridgetown office since this region had the fewest resources.

Conclusions

The impact of the regional workshops was analyzed during the field visits with the respective participants. These workshops have been the focal point of the POA training strategy. Participants took advantage of the workshops to share experiences between the north-south partnerships. Of particular importance were the exchanges and networking among the southern chapters and among the northern chapters. Everyone agreed that the opportunity for face-to-face contact to strengthen the working relationships between partnerships was an extremely important outcome of the regional workshops. Being brought up to date on POA program opportunities was also frequently mentioned as an important outcome. Little mention was made of the technical content of the workshops.

Formal training opportunities for the partnerships are limited. Not only are the number of Trainings limited but the number of volunteers that can participate is limited. Oftentimes, the same volunteers attend all the Trainings. When there are training workshops, attendance can be expensive since usually travel must be paid for by the chapter or individual traveler. Because there are not many occasions for training, training workshop agendas are packed with activities and information. Too much is attempted in too small a timeframe and depth is sacrificed for breadth.

Regional offices in the Eastern Caribbean and Spanish-speaking South America were closed during 1994 and 1995, in a large part due to budget cuts but also because their long-term prognosis at self-financing was discouraging.

The Brazil regional office (ABCA) remains open but is still under the same constraints highlighted by the 1990 evaluation. ABCA implemented 10 training events during 1994 for a total of 501 participants. Six of these events were organized for the Brazil USAID mission but only 13 percent of the participants were from Brazilian partnerships. Of the other four events, three were funded by POA headquarters and the fourth was the ABCA annual meeting at which there were only 10 participants representing 19 partnerships. While ABCA pays for itself through a series of grants, it is not serving the interests of the Brazilian partnerships.

Recommendations

If training and technical assistance are to have a tangible impact on the partnerships (measured not by the existence of multi-year plans but by their implementation) challenges still remain.

Distance learning needs to be exploited as a training tool. An emphasis on distance learning would open up training opportunities to a larger volunteer network at a lesser cost than bringing groups together. Distance learning could be explored through university linkages, video, satellite (Brazil) and the computer. The cost effectiveness of distance learning is undeniable, particularly when volunteer and board turnover is taken into account. In addition, after the initial development cost, courses can be used again and again. The one negative offset is the lack of face-to-face contact.

Every partnership recognized the importance of the face-to-face contact to strengthening the partnership relationship. To counterbalance this, incentives can be developed whereby those chapters participating and completing a series of topics/workshops will have a partnership development trip funded or be eligible for other hands-on training.

ABCA has not been able to provide a leadership role for the partnerships. Understanding the constraints to managing grants while striving to provide a variety of services to the partnerships may provide some interesting learnings for POA and may merit further study. This evaluation agrees with the POA management decision to close two regional offices and does not recommend spending further CA resources to support ABCA.

3.1.3 Staff Technical Assistance

Findings

Most POA professional staff, in addition to their specific program responsibilities, are partnership representatives. The 60 partnerships are divided among the staff and the partnership representative becomes the liaison at POA for the northern and southern chapters. With the objective of providing stronger program backstopping to the partnerships, POA undertook a series of training interventions to upgrade the project planning skills of the staff. The staff takes advantage of any travel to work with the partnerships, whether it is their specific partnership responsibility or not.

Individuals were asked during this evaluation how the relationship between chapters would change if POA international headquarters was not there and while everyone said that the loss of access to resources would seriously affect the partnership, linkages would remain. However, everyone interviewed stressed the importance that the representative plays in brokering, mediating between two cultures, and encouraging the chapters to maximize their resources.

The cooperative agreement funded 98 staff trips to provide technical assistance. Many of these trips included visits to various chapters. These visits provided opportunities for direct, one-on-one working sessions to review the progress on the rechartering process and long range planning as well as to review small grant proposals and other issues deemed important. Many additional trips were taken to the chapters under the auspices of other program grants where staff took advantage of the opportunity to carry out formal and informal training interventions.

Conclusions

Involving all levels of staff as partnership representatives has been an important strategy for POA. Staff understand the challenges inherent in the partnership relation and are committed to strengthening this fundamental component of POA.

With the budget cuts to the CA (and consequent lay off of staff), many staff have had to take on additional partnerships. Staff does not complain about this consolidation of functions and sees this as one of the most interesting aspects of their work. As one staff person said, "If it wasn't for the partnerships, we would not be here. They deserve all of our efforts." This responsibility keeps staff

tuned into the reality of volunteerism and the cross-cultural challenge of working at POA.

Staff work well together and demonstrate a good understanding of the various POA programs and the importance and ability to combine their distinctive features to optimize funding.

Previous evaluations all mentioned that staff was spread too thin. Staff was reduced due to the budget cuts and many wear multiple hats. While staff is certainly not under utilized, they do not seem to be spread too thin.

Recommendations

Partnership representatives should be supported in whatever way possible (training, travel funds and such) so as to continue their on-going support and good work.

3.1.4 Technical Content (Planning, Management, Evaluation and Self-financing)

Findings

All the training agendas reviewed included sessions on local resource development and key programmatic areas. The technical content of the regional Trainings focused on planning and evaluation while the content of the President/Executive Directors workshops and the Convention Leadership Forum focused on partnership management issues. A review of the training materials and methodologies used was not undertaken as part of this evaluation.

Management issues relating to membership were consistently raised during conversations with both northern and southern partners but only one partnership visited during this evaluation (Santa Catarina) was taking action to update the present membership. Most partnerships were aware of what they needed to do (write proposals, update tax exempt status, develop new dues structure and such) but had not passed beyond the planning stage.

The monitoring and evaluation system developed at POA was presented at the workshops but no evidence was seen as to its implementation and use in the field. This point is elaborated further under strategic objective five.

Conclusions

Why is so little impact observed from these Trainings? First, there is no formal system to measure the impact so whatever impact has taken place is going unrecognized. Anecdotal material was gathered during the evaluation, but it was not strong enough to suggest that training was having a lasting impact. The one exception was the President/Executive Directors workshop where volunteers, after returning to their partnerships, did undertake concrete projects such as innovative fund raising (Wisconsin) and membership drives (Santa Catarina) among others.

Annual plans and some multi-year plans are being jointly developed by the partnerships. This has greatly improved since the 1990 evaluation. However, the plans examined resemble lists of

projected activities and lack the inputs on how activities will get accomplished and who will be responsible.

This evaluator believes that POA tried to fit too much into the training curricula in too short a time without the human and financial resources to provide the needed follow-up. Partnership representatives are too busy to be held responsible for all the technical follow-up needed by the partners. Specific focused Trainings based on one theme with both technical and experiential content may have been better able to provide precise skills as well as a basis to evaluate impact.

Recommendations

Emphasis needs to be placed on the technical content of the training sessions. Methodologically, training needs to move from theory to practice, emphasizing experiential learning. More volunteers from any given partnership need to be involved in training activities. Distance training courses could be designed and disseminated electronically covering planning, management and evaluation. Feedback from chapters and partnership reps could also be provided interactively.

Planning was raised as an issue in the last three evaluations. Plans should be a concrete tool to measure progress in preparing, implementing, monitoring and evaluating the activities, not only programmatic but fundraising and management as well. To this end, annual and multi-year plans should all be done on a similar format that can be accessed through the electronic system. This would create uniformity amongst the plans and facilitate follow-up and feedback.

3.1.5 Self-financing

Findings

For the purpose of this evaluation, self-financing includes fundraising and fee for service activities. At the partnership level, it includes all monies that do not come from POA headquarters.

Partnerships are very creative in raising limited local resources through special events and in-kind donations (office space, telephone/fax, translation, technical assistance and such). These contributions support specific activities and administrative costs. It is clearly easier to raise funds for specific activities. Volunteers have a vast network of persons to call upon when they need a donated wheelchair, typewriter, sewing machine or crutches. Cash sources of fundraising are harder to come by.

Five partnerships currently have funding directly from local USAID missions. One Mission stated that POA proposals oftentimes do not fit within Mission strategic objectives and that working with volunteers to develop a viable proposal is very time consuming.

The limited funds that exist for programmatic activities and partnership development efforts usually come from POA. However, some partnerships have had success raising funds. Others have been limited by their lack of 501(c)3 status.

The Wisconsin partnership has recently tapped statewide corporations to fund a second generation leadership exchange between Nicaragua and Wisconsin. Eleven youth from Wisconsin spent three weeks in Nicaragua and returned north with eleven Nicaraguans that spent three weeks in Wisconsin. They studied and examined environmental issues. The Wisconsin chapter raised $13,500. The only stipulation was that the money was to be spent in Wisconsin, so the needed airfares were sent prepaid to Nicaragua.

Conclusions

Training has not effectively dealt with self-financing during this cooperative agreement. Training only superficially covered fundraising and local resource development.

Among the partnerships visited, in the south, raising local resources was not seen as an urgent priority. Northern partners realized the need to raise financial resources but only one partnership was actively doing it. There is an over dependency on POA for funding and many felt that headquarters should do more of it for the partnerships.

Partnerships are not experienced at writing proposals and raising funds from international donors or the private sector. They also have had only limited success raising funds from local USAID Missions. While in-kind fundraising efforts are significant, they are not sufficient. Going from small grants to small donations is a precarious existence at best and does not allow for consistent programming or even setting long-term goals because of the insecurity of funding. Dependable funding is one of the biggest hurdles facing the partnerships.

Developing self-sustaining funding sources is a must if partnerships want to grow in a time of diminishing funding. The idea is not new to the northern chapters but the southern chapters, for the most part, have trouble with the idea of a non-profit, volunteer organization taking on for-profit activities. Partnerships do not know how to initiate fee for service activities and in some cases do not understand why it is an important strategy.

Recommendations

There is a critical need for a training course focusing on identifying funders and grant/proposal writing. This course can be developed for distance learning, through computer technology and other electronic means.

To have the necessary impact, technically qualified consultants should be hired to design and assist in carrying out this training. Materials need to be focused and experience-based, using case studies to focus on the issues that need to be addressed and resolved.

For those partnerships that wish to expand their activities and solidify a sustainable financial base, examining options for generating income, beyond grants and in-kind donations, is a must. For most partnerships, focused training is needed to explore this concept and the legal implications. Ideas need to be developed and a feasibility study (or studies) needs to be undertaken to determine the viability for different countries, regions and POA headquarters. Program funds should be available

to pay for feasibility studies that will propose fee for service opportunities for partnerships.

Investigating opportunities for on-going, fee for service activities and intensive training for chapters to select and review potential options is critical. It will take entrepreneurial thinking to open up new financial venues at the chapter level.

In addition, an incentive structure needs to be developed that will encourage partnerships to raise their own funds. As funding sources become tighter, the ability to generate funds by providing services is imperative.

Northern chapters need to be encouraged to pursue their 501(c)3 tax status in order to be eligible to raise U.S. funds.

3.2 Strategic Objective 2 — Technical Assistance from Partnership Volunteers in Support of Priority Activities

3.2.1 Introduction

The cooperative agreement provides funding for volunteer technician travel, north to south and south to north. This volunteer exchange is an important part of the POA philosophy and strategy. Not only does it promote mutual understanding and establish lasting relationships among citizens and institutions, but it provides invaluable technical training and learning for both sides of the partnership.

3.2.2 Findings

Volunteer technical assistance breaks down into two major categories, technical assistance for program activities and technical assistance for program development. As observed in Table 2, 429 volunteer travelers were funded in 16 program areas for a total of $323,272. Forty-five percent of the funding provided travel monies for partnership development and planning.

The actual funding of volunteer travel is considerably less than was projected in the EOPS. While 720 trips were projected, 429 have been taken through June 30, 1995. This lower number is due to increased air travel costs and the budget cuts but also to the efforts of POA to find other funding for this travel. Other sources of funding are available for programmatic areas such as democratic initiatives, agriculture and women in development. The CA has supported technical assistance that would otherwise go unfunded.

Partnerships agree that the selection and orientation of the traveler is extremely important. While the vast majority of the travelers return motivated to participate in their local programs, it is not unheard of to have a traveler return and maintain only limited contact with the chapter. Many chapters are developing strategies to overcome this obstacle. In Virginia, travelers are required to sign a statement saying that they will commit a minimum of one year to local chapter activities.

The cost of organizing travel was also discussed. Chapters absorb the costs of the communications

to arrange for the travel, not to mention the time involved. Chapters are looking at the possibility of charging a flat fee to the travelers to cover incidental costs to the chapter for organizing the travel but would be a token of commitment as well. Another idea was that travelers pay a greater amount (double the administrative cost) and would be refunded half of the amount at the end of the year upon successful completion of the trip requirements.

Table 2 Volunteer Technician Travel by Sector and Funding				
Sector/Area	No. of Travelers	% of Total Travelers	Funding $	% of Total Funding
Agriculture	26	6	15,788	5
Community Development	2	1	2,060	1
Democratic Initiatives	14	3	10,989	3
Domestic Violence	2	1	3,380	1
Drug Prevention & Awareness	2	1	1,005	.5
Education	14	3	7,191	2
Education for Disabled	11	3	8,772	3
Emergency Preparedness	18	4	14,966	5
Environment & Natural Resources	23	5	25,625	8
Family Life Education	5	1	3,461	1
Health	52	12	50,216	16
Partnership Development/ Planning	228	52	146,026	45
Small Business/ Economic Development	21	5	18,256	6
University Linkages	5	1	6,649	2
Women in Development	4	1	1,912	1
Youth Development	2	1	888	.5
TOTAL	429	100	$323,272	100

The impact of volunteer travel was discussed at length with the chapters visited. An activity to measure impact was undertaken with the three partnerships visited during this evaluation. From this exercise it was highlighted that impact is an on-going process with ripples still being felt 2 and 3 years after the travel was completed.

Travel Grants by Sector
% of Travelers

Partnership Devt
52

WID
3

Educ
3

DI 3

Business Devt
5

Health
18

EPP 5

NRM
5

Ag
6
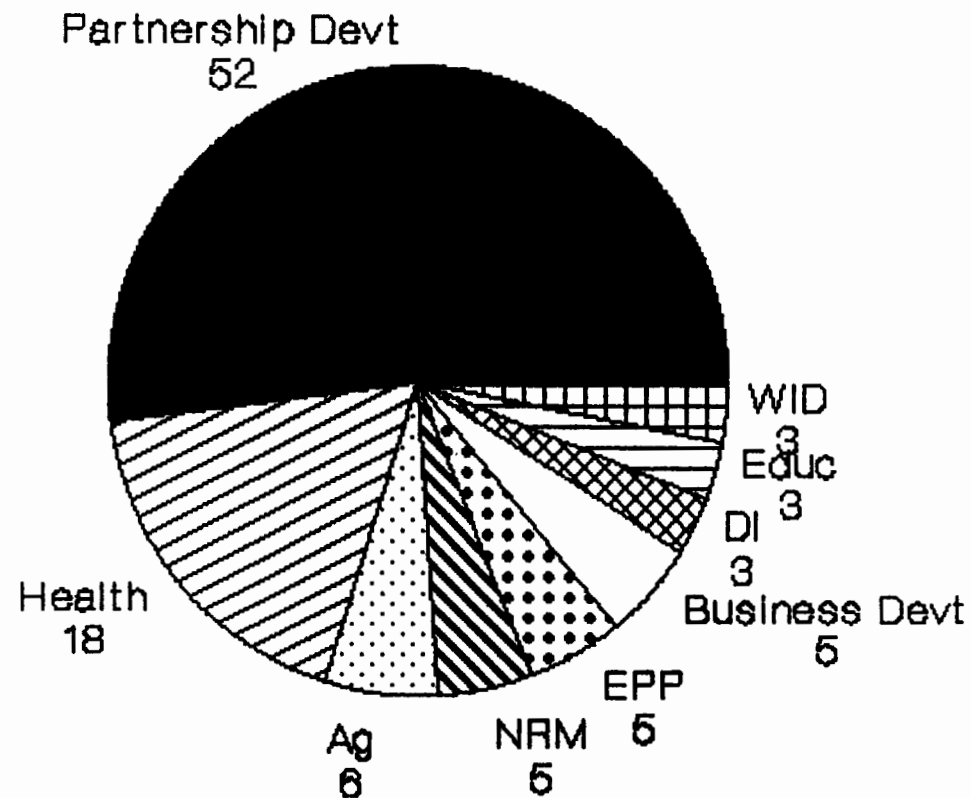
Example:

In a selected travel grant, the recipient had fulfilled all the requirements, writing a trip report upon his return. Nothing out of the ordinary was mentioned. When we looked at the activity two years later, the impact was astounding. Formal and informal meetings with farmers and visits to farms and universities served as a jumping board for many additional activities. Table 3 is an example of the impact of one volunteer technician travel.

Table 3 Impact of Volunteer Travel		
Activity	Result	Impact
Travel to Kentucky for training in pig production	► Workplan ► On-the-job training	Develop projects: ► soils library ► beekeeping (+/- 70 participants) ► technical assistance (+/- 35 direct, 250 indirect) Established University relationships with: ► Technical University-Ambato ► Politechnical school Developed seed program with agricultural association Performed numerous field trials Formed beekeeping associations in 3 provinces

Impacts commonly mentioned as the outcome of partnership development travel are:

► Improved communication (chapter to chapter, subcommittee to subcommittee);
► Face-to-face questions and answers;
► Feedback;
► On-going planning;
► Input into annual plans; and
► Prioritizing needs together.

3.2.3 Conclusions

Even though the EOP for volunteer travel has not been met, under the circumstances, this is positive. The travel has taken place with funding from other sources.

Volunteer travel is an important foundation of any partnership relationship and during the evaluation there was much verbal testimony to that effect. What is missing is a system to measure this impact.

Many partnerships are struggling with an on-going dialogue about how to maximize traveler experience. Strategies should be compiled and disseminated (through e-mail and publications) for charging fees to cover administrative costs and traveler selection and continuing involvement.

3.2.4 Recommendations

Cooperative agreement monies should only be used for limited technical assistance in partnership development. To the extent that travel monies are not available, partnerships should use the income generated through their future fee for service activities, that will be developed in the future, to pay for partnership development related travel.

Administrative fees should be charged to travelers to cover justifiable costs incurred by the partnerships and should be levied by all partnerships.

An immediate solution to measuring impact involves designing a one page form to be filled out by travelers and small grant recipients six months after the activity, again one year after the activity and later, two years after the activity. This would measure the longer term impact of specific interventions and serve to keep the volunteers involved in partnership activities. This follow-up should be the responsibility of the chapter that sent the traveler.

3.3 Strategic Objective 3 -- Small Grants for Community Development

3.3.1 Introduction

Since 1979, POA has awarded small grants for partnership activities. These CA funds are available to support community based projects and partnership development activities. Applications for these funds are made by the partnership and may not exceed $5,000. Funds cannot be used for international travel, building construction or recurring costs. Up to 10% of the total grant may be used to cover direct costs such as communication, domestic travel, clerical support, supplies and coordination.

3.3.2 Findings

With CA funding, POA has awarded 63 small grants worth $134,914. As seen in the following chart, these grants are split among ten programmatic areas, with the majority going to partnership development activities.

Two examples of small grants have been chosen to show the very different nature of these activities.

Example 1:

Through two small grants, one for $4,000 and one for $3,190, the Stevens Point-Esteli partner cities carried out a three phase strategic planning workshop in late 1992 and early 1993. A workshop in Stevens Point brought together 37 participants and a workshop in Esteli had 33 participants with representatives from each chapter in attendance at both workshops. Three fellows also attended. The workshops were facilitated by the Institute of Cultural Affairs in Chicago and Guatemala.

The objectives of the workshops were project development, to establish more effective communication and to develop common goals. The immediate impact of this strategic planning include:

▸ The city of Esteli and Stevens Point opened the Stevens Point Esteli English Academic Center (SPEEAC) in Esteli in 1993. Accredited by the Ministry of Education, the first activity was to train all English teachers in the town. The school is staffed by two volunteer teachers from Wisconsin during the school year. At present there are difficulties locating appropriate volunteer teachers for the 95-96 school year;
▸ Each committee increased their effective membership;
▸ Stevens Point is publishing a newsletter;
▸ Stevens Point produced a video that included an interview of the President of the Esteli committee;
▸ Esteli sent a video to Stevens Point about their city, culture and SPEEAC; and
▸ Communication was established between the partner cities by fax (e-mail is almost complete).

Example 2:

Ambato was awarded a small grant in January 1995 entitled Women, Leadership and Development. The first activity was a workshop in March on sexually transmitted diseases where 90 persons attended representing 30 NGOs. This activity is different than the first activity described in the project proposal. There are a variety of interrelated "women in development" activities being carried out in Ambato (see partnership annex). The chapter is not clear which POA grant funded which project and the evaluator was not left with a clear vision of where the Ambato partnership wants to go with this series of projects. Someone from the Ambato chapter will be traveling to the States in September to learn more about domestic violence programs and upon her return may be in a better position to focus the related activities.

3.3.3 Conclusions

What makes one program successful while another leaves you with doubt? One conclusion may be participation in training events. The partnership involved in the successful project had benefitted from various Trainings and CA funding interventions, including an organizational development workshop. The other project is managed by a chapter that has had minimal participation in training activities and much less CA funding for activities.

Another factor may be volunteer competence and experience in the programmatic area. Whatever the reasons, the question of evaluation and impact appears again. In a world of limited funding, funds must go to those projects that have the most possibility of success. Lessons should be learned from small grant experiences and developed into guidelines to prioritize when and how activities should be funded. Some guidelines do exist but they need to be updated with impact information.

3.3.4 Recommendations

Priority for small grants should be given to partnership development activities since the impact to the partnership and POA as a whole is the main purpose of this cooperative agreement. Other activities should only be funded when all parties have participated equally in the conception of the activity, when the appropriate technical backstopping is readily available (perhaps after a travel grant) and if no other source of funding is available.

Impact can be measured by designing and completing a one page form at various intervals after finishing the program grant.

3.4 Strategic Objective 4 -- Effective Communication between POA and Partnerships

3.4.1 Introduction

One of the goals of the CA is to support communication between POA and the partnerships through the regular production and distribution of newsletters, special publications and mailings in support of project planning and organization development, and through on-going mail, phone and fax communications.

3.4.2 Findings

The CA contributes to the cost of the POA newsletter, partnership maps and one page inserts to the newsletter when the topic pertains to partnership development (such as Standards of Excellence and Fundraising). The publications are of high quality and valued by the northern partners for use in fundraising. Because the newsletter is in English, it is of more limited use to the southern chapters (non-Caribbean).

The CA also supports publications developed by chapters through the small grants program. For the partnerships, it is important to print materials about the partnership relationship and project activities.

With the CA funding cuts the quarterly regional newsletters were discontinued. In addition, during 1994, the POA newsletter was published only three times instead of the usual four. Many partnerships publish their own quarterly newsletters. This effort is usually spearheaded by the northern chapter and is often bilingual.

In the past, with limited funding at the chapter level, routine communications were an important investment among partnerships. Many volunteers absorbed the cost on their personal phone bills, exercising extreme care before placing long distance calls. Mail has always been undependable but there were no other alternatives. Some partnerships also used telex and ham radios for periodic communications. The advent of the fax was a major breakthrough for communication between the partnerships and e-mail has linked partners in an association that is just beginning to open previously unimaginable possibilities.

Small Grants by Sector

Partship Devt/Plng
33

Health
16

Natl Resources
13

EPP
7

WID
7

DI
6

Ag
5

Com. Devt
5

Educ
4

Sp. Educ
4
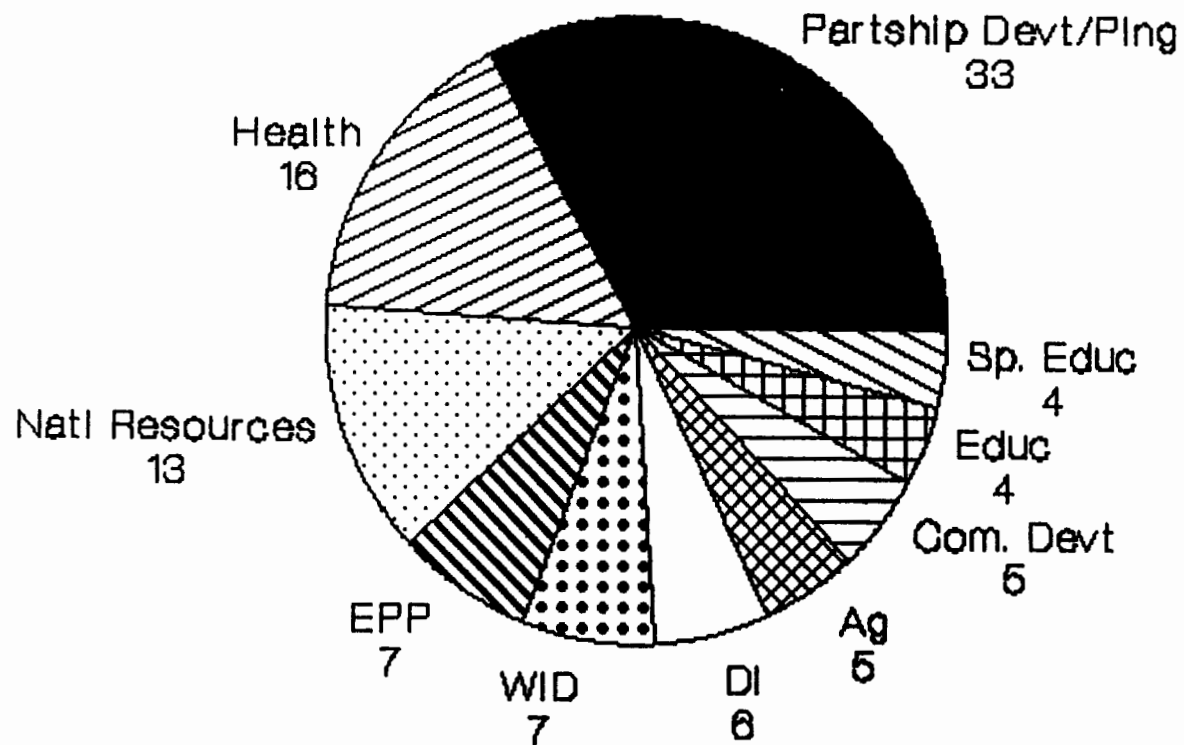
Two of the three partnerships (Nicaragua and Brazil) visited are hooked up by e-mail. They communicate up to two and three times a day and at a minimum of once or twice a week with POA and their partners. The positive impact on interpersonal relationships, planning and project implementation is undeniable. The Ambato chapter does not have e-mail but they do have a computer and fax and communicate regularly.

A little more than 55 percent of the partnerships have some member(s) on e-mail. In the U.S. 38 of the 60 chapters are hooked up to e-mail. In the southern partnership there are 24 chapters hooked up with e-mail; Brazil has 10, Mexico and Central America have 3, Spanish-speaking South America has 6 chapters and in the Caribbean there are 5.

3.4.3   Conclusions

The POA newsletter is one of the more disparate activities funded by the CA. Its direct impact to partnership development is hard to trace.

Everyone agrees that the advances in telecommunications have had an extremely positive effect on the partnerships and have facilitated the partnership reps work and made each chapter feel part of the larger entity.

POA has just scratched the surface of the potential for promoting partnership development through electronic communications. POA needs to target chapters that are not on e-mail to make them part of the system. At the same time, more materials and information need to be sent out through the electronic network.

3.4.4   Recommendations

In an effort to focus, the CA should not fund the POA newsletters. As fee for service income is generated it could be used for the POA publications.

The cost-effectiveness of bringing all the partnerships on-line needs to be studied. A large majority already have computers but may need the modem. Incentives (access to information) could be developed to encourage partnerships to invest in e-mail services.

3.5   Strategic Objective 5 -- A Monitoring and Evaluation System for All Levels of the Organization

3.5.1   Background

As stated in the proposal, "a goal of this five year project is to improve reporting at both the partnership level and at POA and to strengthen POA's ability to analyze project impact...Better goal setting with improved baseline data will allow POA and its regional offices to track partnership activity and report back not just to USAID but to other funding sources."

Datex, Inc.   **Partners of the Americas Cooperative Agreement**   **Oct., 1995**
                                              Final Evaluation Report   **Pg. 21**

3.5.2 Findings

In December 1991, through an agreement with another LAC/EHR program, a consultant worked with POA to design a data collection and entry program as the first part of implementing the monitoring and evaluation system. The first phase of this undertaking involved the identification of the project and administrative elements to be recorded in the data base, design of the prototype entry screens, an implementation plan and timetable for installing the system and recommendations for purchasing appropriate new computer hardware and communication systems. Staff was involved in its development and use. In a second phase, paid for by the CA, the system was installed and staff was trained.

Through a loan of over $100,000 from the POA Foundation, POA upgraded their computer equipment. Since 1992, the monitoring system has been integrated into the management of international headquarters. Program staff and partnership representatives are responsible for inputting data on travel and small grants and generating reports for donors and partnerships. Information is also gathered on volunteers who travel north and south.

All staff have workstations on an integrated network and can access the information in the database. The system has proved useful for headquarters and for this evaluation. Extensive information has been crossed and organized for this evaluation with relative ease.

Using this information for management purposes has proved efficient. However, using the information for measuring program and project impact is more problematical. There is no baseline data available on projects for comparison of before and after impact. A formal system for measuring the impact of travel grants, training workshops and small grants does not exist although anecdotal information abounds.

While rationale for evaluation has been stressed at all the regional training events, monitoring and impact evaluation systems have not been implemented at the chapter level. This has been due to multiple factors. First, while most chapters have access to computers, the technology is not sufficiently sophisticated to manage a data base. Second, the budget cuts eliminated any possibility of training those partnerships that had the appropriate software. As volunteers, time is limited and evaluation has just not been seen as a priority amongst the activities that partnerships are juggling.

One volunteer asked, "How can we measure the impact that my involvement with Partners has had on my family? They have been exposed not only to a foreign language but to a whole culture. My children take Spanish at school. We always host visitors when they come north and the whole family practices Spanish. Where else do you get that opportunity in middle America? That's impact."

As part of the effort to implement the monitoring and evaluation system, new forms were developed for small grants and volunteer travel. These forms capture the pertinent information, but at some point they are either not being filled out or not entered into the system.

Information can be desegregated by gender. The overall gender breakdown at POA can be seen in

Table 4. The only data available on gender from the 1990 evaluation is for volunteer travel grants for all volunteer travel (not just CA). From 1985 to 1990, an estimated 65 percent of the travelers were male. From 1990 to 1995 the estimated number of male travels is at 62 percent. POA staff is 64 percent female while the Board is 38 percent female. However, the Chair and Vice Chair of the Board are women. Partnership Presidents, Vice-presidents and Executive Directors are 39 percent female.

Table 4 POA Gender Breakdown		
Category	% Female	% Male
Volunteer Travelers	38	62
POA Staff	64	36
POA Board	38*	62
President/ Vice-President/ Executive Directors	33 (U.S.) 44 (LAC)	67 (U.S.) 56 (LAC)

* Chair and Vice-chair are women

3.5.3 Conclusions

More than a monitoring and evaluation system, POA has developed a management information system. Measuring impact still remains allusive. This is a chronic problem, raised in previous evaluations. Progress has been made and in retrospect, the original proposal was probably too ambitious, given the lack of appropriate hardware in the field. Unfortunately, the CA impact has been hard to measure beyond subjective and anecdotal information.

3.5.4 Recommendations

The recommendations for strategic objective 2 and 3, to develop a one page format to be filled out by grantees and travelers at various intervals after the intervention, should be institutionalized. This information then needs to be analyzed and the learnings fed back into the system whether to update small grant guidelines, to provide statistics on impact, to replicate successful undertakings or to avoid repeating mistakes.

At this time, it is not worth trying to extend the monitoring and evaluation system to the field. Technology has made great advances in the four years since the system was originally designed and what was once state-of-the-art is now seen as somewhat cumbersome. In the future the system can be upgraded and made available to partnerships through electronic communications.

SECTION 4 -- MANAGEMENT

4.1 Introduction

This CA was designed based on the 1990 evaluation and recommendations. It differs from previous core grants in that the outcomes are measurable and through intensive data collection and reporting, POA is accountable for achieving its goals.

The cooperative agreement was to be for a total of $3.7 million over five years. In 1994 and 1995 the budget was cut 25 percent bringing the five year total to $3.3 million.

This section is divided into four sections: 1) previous evaluations; 2) POA management; 3) finance and administration; and 4) USAID backstopping. Each section has its own conclusions and recommendations.

4.2 Previous Evaluations

4.2.1 Introduction

Three past evaluations of the Partners core funding grants from the LAC Bureau are readily available. These evaluations were carried out in 1980, 1985 and 1990. A selective list of findings and recommendations are highlighted in Table 5. Many of the findings recur throughout each evaluation and efforts have been made to design follow-on projects accordingly.

While important strides were made during the more than fifteen years covered by these evaluations, certain findings and recommendations were found in all three reports. Because of this, the current CA was designed to emphasize organizational development, both for POA and the partnerships. It attempted to establish clear benchmarks and indicators to measure the progress in these areas.

4.2.2 Findings

All the evaluations recognize that POA has been successful in raising funds. They also mention that staff has been spread too thin, planning skills need to be upgraded and the organization needs to develop better reporting systems, data collection and record keeping. One new recommendation in the 1990 evaluation is the phasing out of core grant funding by the year 2000.

The POA Board of Directors is undertaking a strategic reassessment of the Partners 2000 Plan. The Board is placing particular importance on the funding sources for POA and will review the viability of fee for service activities. This recognition by the Board of the need to diversify funding sources is portentous at a time when USAID funding is becoming uncertain and the days of large unrestricted USAID grants are in the past. Should the Board decide to investigate fee for service arrangements, the earmarking of this income to partnership development is crucial.

4.2.3 Conclusions

POA has institutionalized most of the previous recommendations in an effort to upgrade their skills and the quality of their programs. Advances have been made on all of the recommendations from previous evaluations, but more needs to be done.

This evaluation highlights the need to strengthen program planning and impact evaluation. However, even more important is the overlying need to focus on developing self sustaining funding for partnership development activities and the weaning of POA from core grant funding.

A cut of core grant funding at this moment would be an overall 10 percent budget cut for the organization. They have not developed alternative funding sources for partnership development activities. Their programs would be negatively affected.

4.2.4 Recommendations

POA must focus on developing self financing (fee for service) income to replace core funding by the year 2000. By doing this, not only is the organization developing an independence from funder dependent programming but they are also setting an example for the partnerships.

Table 4 Previous Evaluation Findings		
1980 Evaluation	1985 Evaluation	1990 Evaluation
► Complements USAID's development objectives ► Staff is dedicated, highly motivated and qualified ► Careful control of funds and excellent accountability ► Excellent fundraising from non-USAID sources ► Staff spread too thin ► Need to develop planning capabilities ► Partnerships should organize into regional federations	► Technical exchanges and north/south linkages are important and growing ► Successful in attracting non-USAID funds ► Excellent north/south institutional linkages ► Weak fundraising in north and south ► Staff spread too thin ► Train partnerships in OD, leadership, project design and management, long-term goals ► Institutionalize data collection and record keeping ► Increase public relations and public information activities	► Successful in raising funds for specific activities ► Need to develop better reporting systems and procedures ► Assist partners to develop long-term strategies in USAID priority areas ► Train to upgrade project planning skills ► More core funds to regional offices ► More precise reporting to include measurable outputs for program and finance ► Staff spread too thin ► Reduction in core grant funding to phase out by 2000

4.3 POA Management

4.3.1 Introduction

At the signing of the agreement, POA agreed to four additional conditions, listed below.

1. Prepare a detailed annual implementation plan to be submitted annually detailing anticipated funding levels for USAID and non-USAID core agreement support funds.
2. Revise the logframe to include quantifiable and chronological targets
3. Prepare and disseminate a summary of the basic provisions of the core agreement to all partnerships and include a copy of the five year implementation plan.
4. Develop a monitoring and impact evaluation system to cover organizational development activities as well as individual partnership projects.

4.3.2 Findings

The first of the additional conditions added to the CA at signing, prepare annual implementation plans to be submitted to USAID detailing funding levels, took place in 1991, 1992, 1993 and 1994. The latter was done under the auspices of the effects of the projected budget cuts. No annual plan was submitted in 1995.

The logframe was revised during the first three months of the CA and approved by the USAID program manager. A summary of the CA was also prepared and used at training sessions. The fourth condition, the development of the monitoring and impact evaluation system was discussed above in strategic objective 5.

At POA, the CA has been managed by the same staff person since December 1991. This has provided consistency and coherence to the project management. He has been responsible for the overall accomplishment of core grant objectives and reporting and monitoring on the performance of core grant activities.

In an effort to move away from traditional core funds paying general staff salaries, the CA was to pay only those staff directly working on CA activities. Staff billed to the CA was to be reduced over the life of the project from 14 to 10. As a result of the budget cuts, CA support staff was cut beyond the established targets. The workload for existing personnel increased.

Despite the 11 percent overall budget cut, POA has met most of the specified outcomes as seen in Table 6. Volunteer travel grants is the output that was most affected by the budget cuts (in addition to increased cost of air travel), meeting only 67 percent of the target. The partner cities program was also less than projected. This is not an effect of budget cuts but rather of partnerships that have opted to not choose this mode of organization.

Table 6 Status of Outputs and EOPS (through June 30, 1995)		
Outputs and EOPS	**Projected Targets**	**Actual Number**
Volunteer Travel Grants	720	429 (50-75 more projected)
Staff Partnership Interventions	100	98

Newsletters Published	26	17 (U.S.) 11 (Regional)
Small Grants	80	63 (10 more projected)
Project Planning/ Evaluation Workshops	28	26 (3 more planned)
Standards of Excellence and Rechartering	60 (all)	58
Multi-Year Partnership Plans	30 (50%)	35
Technical Assistance/ Small Grants in USAID/LAC Priority Areas	75%	100%
Partnership Chapters with Membership Base of more than 100	50%	55%
Partnerships with Partner City Programs	15	10

4.3.3 Conclusions

While the CA has been well managed (funds accounted for, deadlines met, EOPS accomplished, reports written), it has lacked innovative leadership. POA staff are for the most part generalists and more technical skills in training, curricula development and impact evaluation would have served the CA well. The program manager has worked on the program between 59 and 89 percent of his time (see Table 8). In part this was due to budget constraints but also to the endemic problems of small NGOs that use staff for multiple purposes.

Overall, the budget cuts have had a positive influence on streamlining the efforts of CA staff and trimming nonessential program spending. POA is resistant to focusing more narrowly on programmatic areas (such as only funding partnership development activities). POA claims that the CA provides funds to begin programs in areas where they have not had previous experience (such as reproductive health) or presently do not have alternative funding sources (special education). However, with limited funding, narrowing the focus and scope of CA funds is necessary.

4.3.4 Recommendations

POA needs to recognize when staff are not qualified to carry out certain technical functions and hire more specialized staff or consultants to support them (as with the M&E system).

Most important, POA needs to focus on developing fee for service income. Any future CA funding would be used to identify and start fee for service activities. This means that current activities funded by the CA would cease until POA can develop the alternative funding to pay for them.

4.4 Finance and Administration

4.4.1 Introduction

Previous evaluations have all stated that funds have always been well managed and accounted for.

The following section reviews the actual expenditures made under the CA and the relationship of CA funding to the overall POA budget.

4.4.2 Findings

Table 7 shows CA expenditures by line items as a percent of the total expended budget and since July 1, 1994. These two percentages are shown to reflect the important impact of the budget cuts during the last two years of the project.

Table 7 Actual Expenditures by Line Item			
Description	Expended $	Overall % of Total Budget	July 1, 1994 - June 30, 1995
Salaries (program, regional, & management)	1,182, 654	40	34
Volunteer Travel	652,308	22	30
Staff Travel	117,103	4	3
Other program costs (publications)	174,136	6	4
Communication	100,756	3	4
Regional Offices	90,680	3	3
Small Grants	134,914	5	2
Indirect Costs	509,379	17	20
TOTAL	**$2,961,930**	**100%**	**100%**

The largest proportion of the CA supports POA salaries. This has dropped by 6 percent during the last 18 months as a by-product of the budget cuts. Table 8 provides a breakdown of staff billed to the CA at three point during the CA; the first 6 months, 6 months previous to the budget cuts and the first 6 months of 1995.

The number of staff funded by the CA has been greatly reduced, to a large extent due to the budget cuts. Full-time positions have been reduced by 70 percent. While these numbers are full-time positions, they are divided among more staff. For example, during the first semester of 1991 there were 12 staff billed to the CA, during the semester of 1993 this was reduced to 10 and during the first semester of 1995 there were five staff. Overall, the corresponding budget reduction was only 6 percent. Projecting expenditures for the second semester of 1995, based on the first semester spending, salaries will drop to 18 percent of the total. This reflects the desire of USAID to move from traditional core grant support of salaries to program-related support.

Partners of the Americas
Actual Expenditures for Five-Year Cooperative Agreement
Period: May 1, 1991 to June 30, 1995

	(1)	(2)	(3)	(4)	(5)	(6)
Description	1991	1992	1993	1994	1995 6/30/95	Total
Progr.Salaries (D.C.)	$93,204	$150,798	$102,428	$29,151	$16,582	$392,163
Progr.Benefits (D.C.)	23,154	45,109	28,373	7,871	4,477	108,984
Reg.Reps Salaries & Benefits	45,859	55,520	41,620	20,781	0	163,780
Volunteer Travel	85,346	131,160	232,655	150,604	52,543	652,308
Staff Travel	19,586	37,342	37,964	18,570	3,641	117,103
Communications	5,629	41,873	23,619	19,309	10,326	100,756
Other Program Costs	55,902	33,445	56,930	21,044	6,815	174,136
Regional Center	1,200	47,440	21,217	18,671	2,152	90,680
Mgmt. Salaries (D.C.)	78,465	91,989	118,278	84,846	35,325	408,903
Mgmt. Benefits (D.C)	19,882	23,733	32,763	22,908	9,538	108,824
Small Grants	17,990	29,985	69,496	6,250	10,380	134,101
Indirect Costs	80,363	131,277	172,484	90,801	34,454	509,379
TOTAL	$526,580	$819,671	$937,827	$490,806	$186,233	$2,961,117

f:\excel\budget\447eval.xls

Table 9 Staff Support Billed to the Cooperative Agreement			
Position	% of FTE May-Nov, 1991	% of FTE June-Dec, 1993	% of FTE Jan-June, 1995
Washington Staff			
Program Manager	75	89	59
Director of Publications	59	70	81
Editorial Assistant	58	51	--
Secretary	98	49	16
Reg. Director Caribbean	86	36	--
Reg. Director Central America	21	30	17
Reg. Director Brazil	60	--	--
Reg. Director Spanish speaking S. America	44	26	30
Director, New Program Development	59	51	--
Director, University Linkages	12	37	--
Partner Rep. Spanish speaking S.A.	16	6	3
Partnership Rep Brazil	13	--	--
Regional Staff			
Reg. Representative Caribbean	100	39	--
Reg. Representative South America	--	30	--
Reg. Representative Brazil	--	--	--
TOTAL	**7.01**	**5.14**	**2.06**

Staff Billed to CA
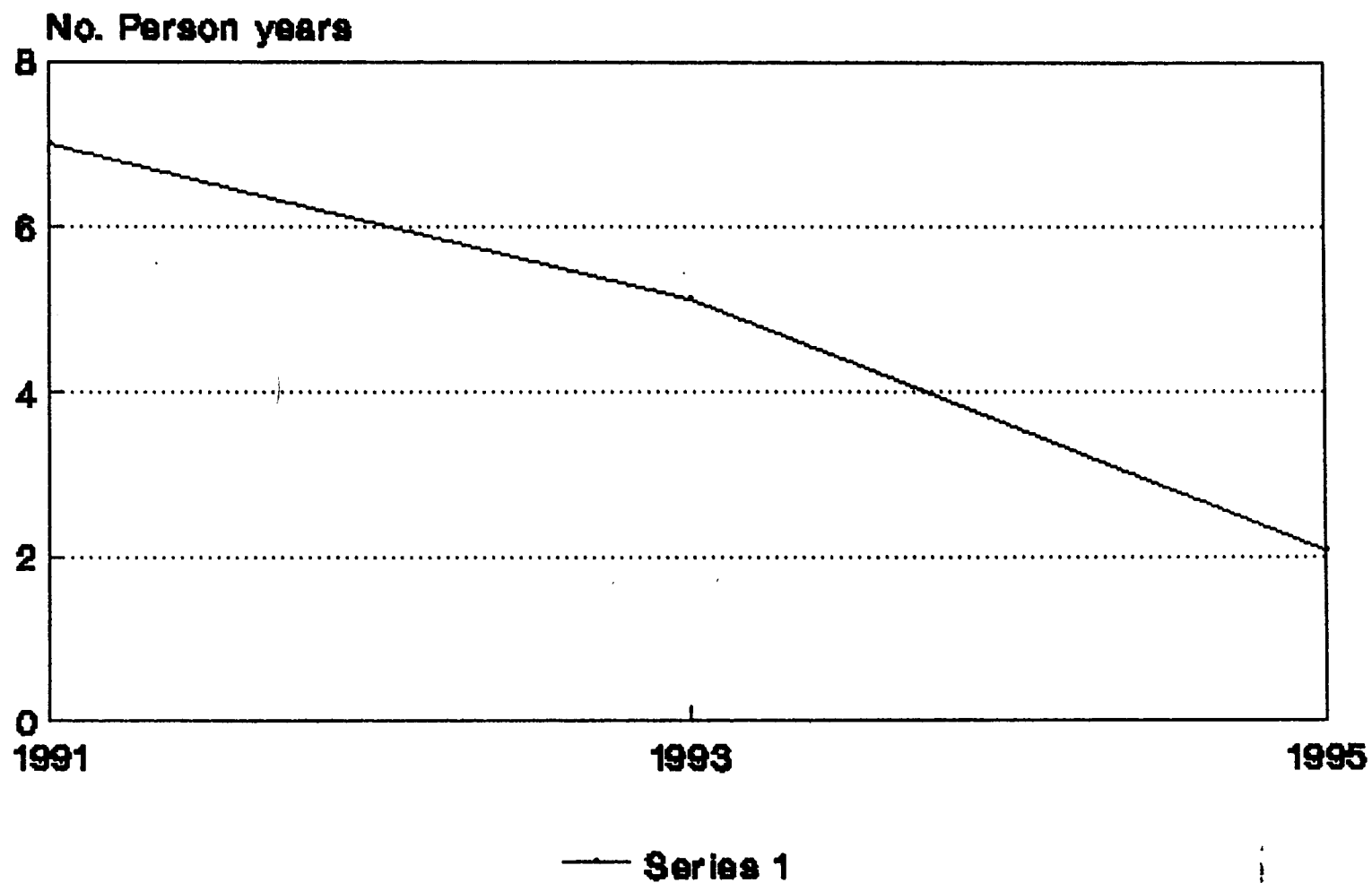
No. Person years

——— Series 1

Table 9 shows the percentage of CA funds to the overall POA budget. During the five-year CA, the percentage of CA funds oscillated between 5 percent and 16 percent with 1995 estimated at 8 percent.

In-kind contributions play an important role to the CA and to POA as a whole. As a volunteer organization, all labor is free of charge, and local board, lodging and transportation are generally donated. There is a two to one matching contribution in service and materials on the small grants. When the chapter administrative costs are calculated, the CA has generated a four to 1 in-kind contribution, or roughly $13 million.

4.4.3   Conclusions

As seen in previous evaluations, the funds have been well managed and accounted for.

POA has surpassed the staffing targets established by USAID at the beginning of the CA. At the current level of activity, staffing is at the minimum possible to manage and implement the CA.

4.4.4   Recommendations

POA should continue its meritorious efforts in streamlining program costs and financial tracking and reporting.

4.5   USAID Backstopping

4.5.1   Findings

As a cooperative agreement, USAID was able to have substantive involvement in the implementation of this program. Since its inception, there have been three different project officers. The first was very involved, working with POA to meet the requirements pertaining to the log frame, the annual implementation plan and the design of the monitoring and evaluation system. The later two project officers were less involved.

An e-mail questionnaire was sent to the LAC Missions. Responses were received from Bolivia, Colombia, Dominican Republic, Haiti, Honduras, and Mexico. Personal interviews were carried out in Ecuador and Nicaragua and Brazil was interviewed by telephone. The following table highlights the comments made by the Missions.

PARTNERS OF THE AMERICAS REVENUES
1991-1995

REVENUE SOURCE	1991	1992	1993	1994	(EST.) 1995	TOTALS 1991-95	PERCENT OF TOTAL
LAC COOP. AGREEMENT	$480,328	$819,672	$984,078	$490,808	$525,114	$3,300,000	8.5%
OTHER AID LAC FUNDS	26,543	53,933	183,351	404,663	225,489	893,979	2.3%
OTHER AID.FUNDS	7,828,744	5,242,504	2,831,378	4,216,762	4,601,619	24,721,007	63.7%
USIA FUNDS	443,564	470,214	470,243	394,254	395,587	2,173,862	5.6%
PRIVATE FUNDS	1,421,080	1,891,803	1,667,516	1,508,211	1,252,191	7,740,801	19.9%
TOTAL REVENUES:	$10,200,259	$8,478,126	$6,136,566	$7,014,698	$7,000,000	$38,829,649	100.0%

Source: A-133 audits

REVS8998.WK1

PARTNERS OF THE AMERICAS
REVENUE ANALYSIS, 1991-1995

(Millions)

$11.000
$10.000
$9.000
$8.000
$7.000
$6.000
$5.000
$4.000
$3.000
$2.000
$1.000
$0.000

1991   1992   1993   1994   1995
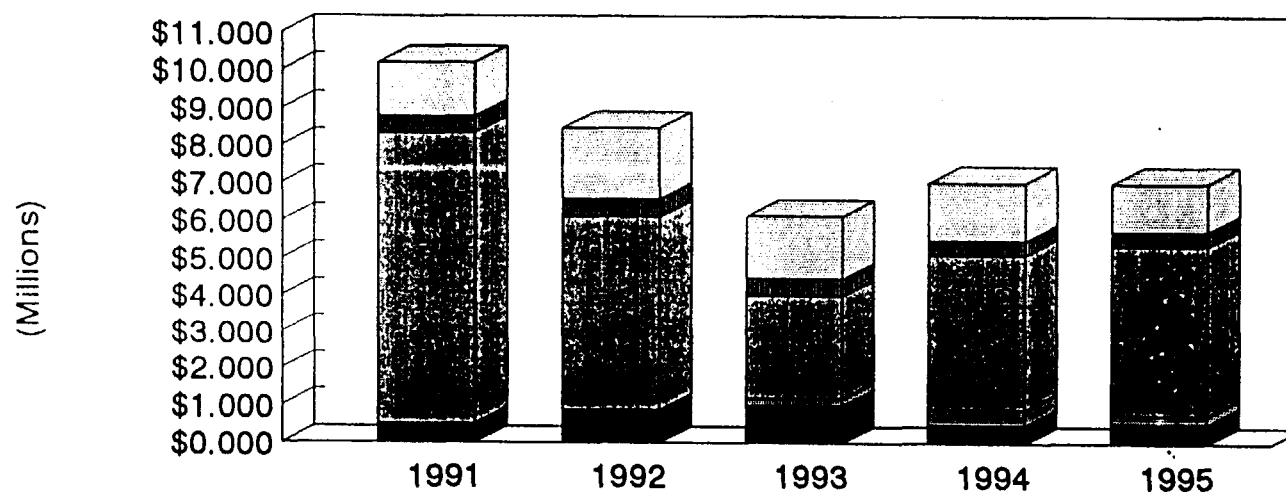
■ AID COOP. AGREEMENT   ▨ OTHER AID LAC FUNDS   ▨ OTHER AID FUNDS
■ USIA FUNDS   ▢ PRIVATE FUNDS

Table 11 LAC Mission Comments about POA	
Positive	Areas to Improve
▸ Resources from U.S. ▸ Responsive, professional ▸ Respected, well-known ▸ Strong counterpart support ▸ Able to leverage additional resources ▸ Local focus	▸ In-country management structure ▸ Sustainability ▸ More collaboration with local institutions ▸ More focus on limited number of activities ▸ Dependency of chapters on 1 or 2 persons

For the most part, these observations reflect the findings and conclusions of this evaluation, particularly the sustainability issue and focusing on a limited number of activities.

4.5.2 Conclusions

The project was not well designed in that it attempted to do too much. Input from USAID could have helped the CA to focus and to receive more technical input from other USAID programs (as with the design of the M&E system) USAID backstopping has been laissez faire when what was needed was input and guidance.

4.5.3 Recommendations

If USAID were to provide more funds to POA, they need to work closely with POA to develop a very focused program on fundraising and fee for service strategies for POA. The next program would place responsibility on POA and partnerships to generate funds for partnership development activities. In keeping with the 1990 evaluation recommendations, this cooperative agreement funding should be phased out by the year 2000.

POA needs technical support from USAID, connecting them with other USAID projects with experience in distance learning techniques in Latin America and private sector projects that have encouraged NGOs to implement fee for service strategies. POA staff could visit distance learning projects and have exchanges with other organizations using computer, satellite and video training methodologies as well as fee for service strategies for organizational sustainability.

POA would be better served by being backstopped from an USAID Bureau or office that could provide more technical input and channel more appropriate in-kind resources such as a PASA or RASA specialized in developing distance learning materials or short-term personnel available through a technical services contract.

If POA chooses to follow the recommendations made in this evaluation, the organization will be moving into areas where they do not have experience (distance learning, fee for service) and will require technical assistance to carry out a new project in an efficient, effective and timely manner.

Annex A

Persons Met & Contacted

ANNEX A: PERSONS MET & CONTACTED

USAID/Washington

Marilyn Arnold, Project Officer, LAC/EHR
Dave Evans, Director, LAC/EHR
Cathy Fruchela, Contract Officer (by telephone)
Sue Hill, Team Leader, LAC/SPM/PS
Twig Johnson, Director, LAC/RSD
Sharon Epstein, Deputy Director, LAC/RSD
Ford Brown, LAC/RSD/DHR

Partners of the Americas Headquarters

Stuart Beechler, Director of Partnership Development and Partnership Rep
Barbara Bloch, Regional Director for Central America and Partnership Rep
Doreen Cubie, Director of Publications and Partnership Rep
Roz Elahi, Grants Accountant
Jim Feaster, Regional Director for Spanish speaking South America and Partnership Rep
Tanya George, Vice President
Lucy Gude, Chairperson, Board of Directors
Ed Potter, Partnership Rep
Kate Raftery, Director of Leadership and Partnership Rep
Bill Reese, President (by telephone)
Marta Cecilia Villada, Director of Citizen Participation and
 Partnership Rep

Please see country annexes for persons met in country and at partnerships

Annex B

Scope of Work

1.1   BACKGROUND

The Partners of the Americas (Partners) was conceived and established as part of USAID in 1964 to develop greater U.S. and Latin American citizen involvement in the Alliance for Progress and to promote better understanding of the needs and resources for economic and social development through people-to-people activities.   In 1966, Partners was formally set up as a separate legal entity (formerly called the National Association of the Partners of the Americas, NAPA), which has received support from USAID continuously over the period.

Since its inception, Partners has attempted to support and strengthen individual State Partners programs in the U.S. which are paired with similar organizations in Latin America and the Caribbean.   The principal objectives of the partnerships are to:

1.   promote mutual understanding and establish lasting relationships among citizens and institutions of the United States, Latin America and the Caribbean; 2.   foster volunteerism and self-help attitudes in the implementation of economic and social development projects; 3.   strengthen democratic organizations in Latin America and the Caribbean; 4.   leverage development assistance funds from the U.S. Government and other sources through the private sector nature of the partnerships.

Partners provides project development, organizational and management support to the individual partnerships.   The association is also responsible for raising corporate, foundation and government grants that help sustain the program.

The Partners program at the present time includes 60 partnerships in 46 U.S. states and the District of Columbia working with their counterparts in 32 Latin American and Caribbean countries.   For example, Vermont is paired with Honduras, Kansas with Paraguay, and Oregon with Costa Rica.   Each side of a partnership--the U.S. committee and the Latin or Caribbean committee--is organized as a private, non-profit institution in its respective community with by-laws and regularly elected and rotated officers.

1.2   TITLE

Project Number: 598-0000

Title: Partners of the Americas, PD&S 598-0000

1.3   OBJECTIVE

The current Cooperative Agreement (CA) was signed on September 27, 1991 and will expire December 31, 1995. The purpose of this evaluation is to review partnership activities supported by the USAID core grant, and assess the extent to which Partners has achieved the purposes established in this grant. The evaluation will ascertain if Partner's program has achieved the purposes established in the agreement signed and agreed to in 1991.

The evaluation should address the goals of the agreement that Partners is to work toward achieving the stated purpose by improving its capacity to provide: 1) technical assistance and training to its employees and its partnerships in the areas of planning, management, evaluation and self-financing; 2) effective technical assistance from partnership volunteers in support of priority activities; 3) greater access to small grants for community development; 4) effective communications between Partners and the partnerships; and 5) an effective monitoring and evaluation system for all levels of the organization.

Partners was to address these five critical areas through a phased-in series of targeted workshops and training programs over the life of the project, as well as administering a program of small grants for development activities in the southern partnerships.

Beginning with the Eastern Caribbean and moving to Central America and South America, Partners was to upgrade the skills of staff members and key officers of Partners and of volunteers of north/south partnerships. Relevant reporting and self-financing by the organizations were to be stressed and improved. In furtherence of these activities and to accomplish program goals, efforts were to concentrate on improving and consolidating Partners staff support for the partnerships, strengthening the regional centers and establishing appropriate and manageable program priorities.

It was expected that training and development activities would include approximately 28 project planning and evaluation workshops; 720 technical assistance exchanges; 100 Partners technical assistance visits to the partnerships; and 26 newsletters. In addition, approximately 80 small grants funded at an average of $2,875, and generally, no more than $5,000 each, were to hav been awarded to north/south partnerships to carry out community development activities.

1.4   STATEMENT OF WORK

A.   Evaluation Questions

1.4   (Continued)

The evaluation will examine, but not be limited to the following:

1. Program Management

       a.   What effect overall did the unexpected cuts in Partners regional funding have on the project, and what has been done in light of the cuts to protect the integrity of the project? What has been the impact on the schedule?

       b.   Is the administration and management by Partners and LAC/RSD/EHR adequate and effective?

       c.   What steps has Partners taken to assure self-sustainability for headquarters operations? If it is determined that the headquarters operations are not yet fully self-sustaining, what additional support is required? What are potential non-USAID sources for receiving this support?

2. Cooperative Agreement Impact Over Five Years

       The evaluation should assess Partners' progress toward meeting End of Project Status (EOPS) as agreed to in the proposal for the Cooperative Agreement. They are:

       a.   All 60 partnerships will have met Partners' Standards of Excellence for organizational development;

       b.   At least 50% of the partnerships will have well-defined, multi year project plans that include a monitoring and evaluation system, that reflect gender considerations and project impact related to gender, and self-financing strategies.

       c.   At least 75% of the partnerships' technical assistance travel and small grant activities will be in priority program areas as reflected in Partners' long range plan and/or address opportunities important to the host country.

       d.   Reporting procedures at Partners will track results of core-funded activities and demonstrate in reports to USAID specific activities/performance, including gender impact, resulting from Core Grant funding.

       e.   50% of the partnership committees will have a solid membership base of at least 100 volunteers, at least 40% of whom are women.

       f.   15 partnerships will have instituted Partner city programs;

       g.   Revised Partners project planning and evaluation system

1.4   (Continued)

will reflect gender considerations.

In addition, the evaluation should also attempt to ascertain to what extent the program has had in other effects -- positive or negative -- including, but not limited to:

1.   generating among U.S. participants a commitment to humanitarian and economic assistance for LAC;

2.   a change in attitude towards LAC among U.S. participants, committees and institutions;

3.   the degree to which LAC participants develop a greater understanding of the U.S. through their involvement in the program;

4.   the extent to which the Partners program fosters democratic concepts and institutions in LAC;

5.   the degree to which the Partners program fosters a positive image of USAID and the projects it supports in LAC.

B.   Methods and Procedures

During the evaluation, the Evaluator will be asked to explore successes and failures and the factors associated with both. To obtain useful information, the Evaluator will visit three LAC partnerships and their three U.S. partners with particularly innovative, developmentally responsive activities that have resulted in sustainable impacts and those partnerships that have not been particularly effective that may offer some useful insights regarding pitfalls and problem areas to be avoided or planned for. The evaluation will take place over the period of one month: one week in USAID/W for briefings and other preparations; two weeks for travel to Partners sites; and one week to write the report.

For each of the partnerships chosen for site visits, the evaluator will base their findings, conclusions and recommendations on:

1.   Inteviews with relevant Partners staff, USAID staff, volunteers from both the U.S. and Latin and Caribbean committees, beneficiaries and when appropriate, representatives of local and national government agencies and other local cooperating organizations;

2.   observation and assessment of on-going project activities or results of recently completed activities; and

3.   review of relevant documents at Partners, the Committees and USAID regarding the partnership under study.

1.4   (Continued)

> To supplement the information gained through a case study approach
> of the partnerships visited, the evaluation team will also review
> relevant documents (the 1990 evaluation and other past
> evaluations); Partners/partnership-related cable traffic at AID/W;
> relevant documents at Partners headquarters; interview Partners
> headquarters staff, relevant USAID/W staff and by phone, some
> missions that were not visited but have useful information to
> share.

1.5   REPORTS

REPORTING REQUIREMENTS

At the conclusion of the evaluation, the Contractor shall submit a
draft report to be reviewed by LAC/RSD/EHR that will include, at a
minimum, the following:
1.   Project Evaluation Summary
2.   Executive Summary
      a.   purpose of evaluation
      b.   methods used
      c.   findings
      d.   lessons learned
      e.   recommendations
3.   Main Body of the Report - will address each of the
      objectives of the evaluation and answer the questions
      posed in the statement of work and any others that
      arise as the evaluation progresses.
4.   Partnership Case Studies: The substance of this
      section should be organized by stating the
      question/issue raised in the statement of work and
      followed by a discussion of the findings, conclusions
      and recommendations.
5.   Major Findings
      a.   Lessons learned
      b.   Recommendations
6.   Appendices
      a.   Bibliography of documents
      b.   Scope of work for the evaluation
      c.   Methodology of the evaluation

The Contractor will submit five copies of the final report
incorporating any comments or changes made by LAC/RSD/EHR by
August 1, 1995.

1.6   TECHNICAL DIRECTIONS

> Technical Directions during the performance of this delivery
> order shall be provided by the Project Officer as stated in Block
> 5 of the cover page pursuant to Section F of the contract.

Annex C

Guiding Questions for Interviews

Name: Partnership: Position:

GUIDING QUESTIONS FOR FIELD VISITS

Partnership Development

Organizational Development
What does POA headquarters provide to you? Is it timely? Appropriate?

What do you like best about your relationship with POA?

What would you like to change?

What has the most recent Excellence Program rechartering process fone for your partnership?

Training
What conferences/training/exchanges have you participated in?

What impact have they had on your work?

Is there anything you would have done differently?

Are there services or training that you would like to have access to?

Fundraising
What do you do to raise local funds?

What local funding sources have you tapped?

Would you be willing or able to pay for some of the services provided by POA?
 ie: partnership training, fundraising

Do you think POA should raise the membership dues from $100? If so, to what?

    Is there a programmatic area where your partnership has a competetive advantage? What
    is it? Could this talent be parlayed into a service you could sell?

N/S Partnership
        What are your partnership strengths? Weaknesses?

        What are you planning to do to strengthen the weaknesses?

        How often to you communication with _____

If the POA headquarters was not there, how would your relationship with
_____ change?

Program

What are the current programs?

What are the current priorities?

How do you measure the impact of the POA north/south interventions?

What kinds of information do you keep on your ongoing and past projects?

What local organizations collaborate with POA?

Annex D

Detailed Partnership Profiles

KENTUCKY-ECUADOR (AMBATO) PARTNERSHIP

BACKGROUND

Three separate independent chapters in Ecuador (Ambato, Quito and Santo Domingo de los Colorados) are partnered with Kentucky. Idaho-Ecuador is also a partnership and represents Cuenca and Guayaquil. While the Kentudky-Ecuaadoar partnership involves three cities, only one (Ambato) was visited and incorporated into this evaluation.

Ambato is the third largest city in Ecuador, located about 150 kilometers south of Quito, the capital. It is an arid area, characterized by its proximity between the mountains and the plains.

The Kentucky-Ambato partnership is more than 15 years old and over the years has carried out numerous activities. The Ambato committee has six active sub committees: agriculture, special education, emergency preparedness, education, art and culture, and women in development (which encompasses health and democratic initiatives). The Ambato chapter has had donated office space and free communications (telephone and fax) in the Agricultural Center (Centro Agricola) for more than ten years. The Emergency Preparedness Program has a paid country director based in Ambato.

The Kentucky partners enjoy a relationship with the University of Kentucky in Lexington whereby the University provides office space, communications and 25 percent of a staff person's time to work on Partners activities.

Various Peace Corps Volunteers have been assigned to the Ambato Committee during the past ten years. They have worked with different sub-committees according to their skills. At present, a small business volunteer works with Ambato.

Another unique characteristic of the Kentucky/Ecuador partnership is that they have had Fellows in seven of the eight Kellogg Fellow Programs. This has had an extremely positive impact on the quality of leadership both in the southern and northern committees. The President of the Kentucky chapter (and a Kellogg Fellow alumni) was elected to the POA Board of Directors last year.

1

METHODOLOGY

During a short, two-day visit to Ambato, formal and informal meetings and discussions were used to collect data. A meeting with the Executive Committee provided an invaluable resource for information sharing and site visits and sub committee meetings complemented the information gathering process.

COOPERATIVE DEVELOPMENT IMPACT

PARTNERSHIP DEVELOPMENT

Technical Assistance and Training to Partnerships

Background

In May, 1993, the CA funded a regional long range planning and evaluation workshop in Quito. The purposes of the workshop were to:

- Develop and enhance long-range partnership plans;

- Strengthen planning and evaluation skills;

- Share successful partnership efforts and lessons learned;

- Improve communication between committees, within the partnership and with the Washington and regional offices; and

- Create strategies for developing local resources (financial, institutional and human).

Findings

Among the participants were three volunteers from Kentucky and two from Ambato. During the evaluator's visit to Ambato and Kentucky, she conducted an activity with each chapter to measure the impact of the regional training workshop.

Only one participant from Ambato participated in the impact excercise. He considered the content of the conference appropriate and interesting. However, he was frustrated when it came to

2

applying the learnings and trying to develop clear objectives in relation to the annual workplan. While he understood it at the conference, applying it to his situation proved challenging. For him, the real impact of the gathering was the contact with other volunteers. This impact, while less tangible than project-specific impacts, is very important by the members. The face-to-face contact with other southern counterparts is a source of much stimulation and an opportunity for concrete exchanges about not only partnership development issues but project implementation issues as well. The solidarity produced by these encounters as well as the exchange of ideas and solutions is an important ingredient to partnership development.

The Kentucky participants also valued their participation in the workshop. In addition to developing the annual plan, they felt that, since the conference, communication with the chapter has been improved. Each chapter developed a membership directory and frank discussions were held and strategies developed for closing the EPP office in Quito.

Effective Communication between POA and Partnerships

Findings

Developing improved communication strategies was a goal of the working sessions held between the Kentucky-Ecuador partners at the Quito meeting. Both chapters (Kentucky-Ambato) feel that they have succeeded. Most communicating is done by fax since Ambato does not have e-mail. However, Kentucky and Quito are hooked up to e-mail. The chapters communicate with Kentucky on an average of two times a week. Kentucky is responsible for publishing a quarterly newsletter.

PROGRAMS

Technical Assistance from Partnership Volunteers in support of Priority Activities

Findings

The impact of a technical assistance travel grant was evaluated. The impact is impressive and two years later is still being felt through new program activities. However, on the other

hand, the committee recognized that not all travelers return with the same ability to parlay their learnings into projects. Both chapters stressed that the selection of volunteers for travel is extremely important and that fortunately they have only had one case where a traveler, upon returning, did not respond to the expected outcomes.

Table XX
Impact of Volunteer Travel

Activity	Result	Impact

Travel to Kentucky for training in pig production	- Workplan
	- On-the-job training
		- Develop projects:
		  - soils library
		  - beekeeping (+/- 70 participants)
		  - technical assistance (+/- 35 direct, 250 indirect)
		- Established University relationships with:
		  - Technical University- Ambato
		  - Politechnical school
		- Developed seed program with agricultural association
		- Performed numerous field trials
		- Formed beekeeping associations in 3 provinces

The agriculture subcommittee is assessing the possibility of a seed certification program that would cover its costs and perhaps generate additional income. This would be an outgrowth of the Farmer to Farmer program. Some initial funding would come from PL480 program. Ambato is in process of writing and submitting a proposal.

Small Grants

The only small grant funded by the CA to Ambato was awarded in January 1995 and is entitled Women, Leadership and Development. The first activity was a workshop in March on sexually transmitted diseases where 90 persons attended representing 30 NGOs. This activity is different than the first activity described in the project proposal. There are a variety of interrelated "women in development" activities being carried out in Ambato (see section on additional comments). The chapter is not clear which POA grant funded which project and the evaluator was not left with a clear vision of where the Ambato partnership wants to go with this series of projects.

ADDITIONAL COMMENTS

USAID/Quito

During a meeting with Kenneth Wiegand, the Director of the Agriculture and Natural Resources Office at USAID/Quito, the strategic objectives of the Mission were discussed with relation to the POA programs. In brief, the four strategic objectives are:

- Sustainable economic growth;
- Support of democratic initiatives;
- Health; and
- the Environment.

The POA programs in Ecuador (EPP, Democratic Initiatives, Leadership Development, Farmer-to-Farmer) are well in tune with the Mission's strategic objectives.

USAID/Quito has been supportive of the Ecuador chapters, lending their conference room for programming meetings and channeling information on potential resources that may be available. However, they have no program funds available.

Ambato Field Visits

The evaluator participated in a series of visits to various projects that are supported or may be supported in the future by the Ambato chapter. The first visit was to the attend the inaugeration of Youth Center established and run by INNFA (Institute for Family and Children). More than a year ago they had been broken into and are only now able to reopen. The center was visited by two volunteers from Kentucky just after the break in and the center felt that the two volunteers had offered to send toys. They have not heard anything since. Many of the clients of the youth center are potentially abused children. At this time, there has been no direct collaboration between the Ambato chapter and this project.

We visited the Rosa Victoria Salazar health clinic that is run by the Ladies of the Red Cross. The Executive Director of the Ambato chapter is a doctor and she has been involved with the clinic through a group of female doctors in Ambato. During our visit, she donated some orthopedic braces to the clinic that had

6

come from Kentucky. The clinic offers services to abused children and has signed agreements with laboratories and specialists in Ambato to provide free treatment and analysis as the case warrants. During the first 4 months of operation (May 94- August 94) they treated 246 patients. They have recently moved and have not yet regained the patient base. They need to undertake publicity about the services offered and the new location.

We visited the Ambato Jail's clinic where the same group of women doctors from Ambato provide free services to female inmates one Saturday a month. The doctors coordinate with other medical specialist on a case by case basis. The prison has a female population of between 30 - 50 women and 20 children. Most are there for drug use and traffiking or forgery. Partners plans to donate some medical supplies. A nurse with experience in prisons will be visiting from Kentucky. An Ambato volunteer will be traveling to Kentucky in September to visit prisons and domestic violence programs.

Lourdes Espinosa traveled to Kentucky in January 1995 funded by the Citizen Participation program. It is hoped that she will initiate programs focused on empowering women and on the environmental responsibility of citizens. We went to the Municipal Office of Community Development knowing that she would not be available. Instead we met with Lcda. Aracelly Bucheli, who had just returned from maternity leave and was not aware of any potential projects with POA. Ambato is sceptical about working with the Municipality. Elections are a year away and the offices are becoming politicized. They are questioning whether to keep putting in more effort or to let the initiative lie for the moment.

A meeting was held at CODEMFA - Centro de Orientacion y Desarrollo de la Mujer y la Familia with the volunteers that have been instrumental in its organization. CODEMFA was started by POA with a small donation (about $500) from a German NGO. It provides cunseling services to battered women. The first month that it opened there were 70 clients. The numbers have continually declined since then. Volunteer secretarial help has been hard to motivate and keep.

After the CODEMFA meeting we visited a women's leather project that had received a small grant from POA (not CA funded) for a small business activity in leather goods. Ambato and the outlying

7

regions are known for their artesanal leather industry. The workshop was locked and the women were not available.

Conclusions and Recommendation

Since 1985 the Executive Director of the Kentucky chapter has been a University employee with 25 percent of her time dedicated to Partners activities. The impact of the arrangement with the University of Kentucky is clearly seen in the organization of this partnership. Files are complete, communication is followed-up, and the support to both sides is timely. In addition, there is a long-term institutional memory that serves both sides of the partnership well.

As with all partnerships, there needs to be more documentation of impact. Travelers should be asked to complete a simple impact statement six months after completing travel, one year after, and two years after. This is also a good marketing tool for both chapters when looking for funding.

Ambato has been successful in raising in-kind donations. The local newspaper donates a one page insert to POA every week. The chapter has been using this insert to promote women's issues and citizen participation. This is good exposure for the chapter and also useful for funding purposes.

The efforts by the agriculture subcommittee to develop the seed certification program and generate income should be supported in whatever way possible.

The Ambato chapter manages many more activities than what has been reviewed here. They need to focus on a few specific activities, particularly those where members are professionally qualified. Undertaking complex activities in another professional domain without proper project support and backstopping is not a good use of limited resources.

QUESTIONNAIRE RESPONSES

This partnership is content with their relationship to international headquarters. They feel that there is clear guidance and orientation. The north feels this relationship has been enhanced with the advent of e-mail.

8

They feel adequately represented at training workshops and annual meetings but would like some very specific training in grant writing and the use of POA forms. Training workshops should be of longer duration and more hands-on, learning oriented. Volunteers should be used as trainers. Some volunteers would like English and Spanish classes.

The north has undertaken various fundraising events, from a global marketplace selling Ecuadorian crafts to bake sales. Ambato raises money only for specific projects, usually through in-kind donations.

Both chapters agree that dues should be raised and suggested doing it in conjunction with a membership drive. The dues structure should be increased in stages instead of all at once. There was also a suggestion that chapters pay dues on a per member basis and that there be incentives, such as matching grants, for raising cash.

The partnership sees their strengths in their gender mix, their recruitment of specific skills, the paid Executive Director position in Kentucky and their ability to work together cooperatively. Their weaknesses are in fundraising, too few members in both chapters and the lack of bilingual members. One Kentucky officer feels that the program is too tied into the University. Lastly the poor communication and transportation system between the Ecuador chapters was lamented as an impediment to overall partnership development.

List of Persons Met

Ecuador

Santiago Anasco, Partners/Ambato
Graciela Graces, Partners/Ambato
Hernan Graces, President, Partners/Ambato
Mery Guerrero, Partners/Ambato
Eduardo Majorga, Partners/Ambato
Diego Martinez, Partners/Ambato
Jorge Mogrovejo, Partners/Ambato
Rosario Osario, Executive Director, Parnters/Ambato
Jorge Pavon, Partners/Ambato
Giovanna Paredes, Partners/Ambato

Luciano Ramos, Partners/Ambato
Marco Sanchez, Partners/Ambato
Mario Tamayo, Partners/Ambato
Nelly Tobar, Partners/Ambato
Hugo Velasco, Partners/Ecuador Emergency Preparedness Program
Kenneth Wiegand, USAID/Quito
Ramiro Zurita, Partners/Ambato

Kentucky

Kay , Executive Director, Partners/Kentucky
Ron, President, Partners/Kentucky
Vern Case, Partners/Kentucky, Farmer-to-Farmer
Nancy Chesser, Partners/Kentucky, PATH
LaVonne Jaeger, Partners/Kentucky, PATH
Marge Keller, President-elect, Partners/Kentucky
Ruby Layson, Partners/Kentucky, Civic Education

Ambato Schedule

Wednesday, July 12	PM -	Arrive Quito
Thursday, July 13	12:30	Meeting with Kenneth Weigand USAID
	6:00	Meeting with Ambato Executive Committee
Friday, July 14	9:30	Meeting with EPP subcommittee
	11:30	Attend inaugeration of Youth Center
	2:00	Visit health clinic Rosa Victo riaSa lazar
	3:00	Visit Ambato jail health clinic
	4:00	Meeting with Municipal

10

		Community Development Office
Saturday July 15, 1995	9:00	Meeting at CODEMFA Offices
	11:00 project	Visit to Women's leather
	1:30	Depart Ambato for Brazil

Schedule Kentucky

Monday, July 24	11:30	Arrive Lexington, Kentucky
	12:00	Lunch with Kay Roberts, Executive Director
	4:00	Meeting with Marge Keller, President-elect and Ruby Layson
	7:00	Dinner with Executive Committee

Tuesday, July 25	9:30	Meeting with Nancy Chesser and LaVonne Jaeger
	12:00	Lunch with Ronn Padgett and Kay Roberts
	4:00	Meeting with Vern Case, Farmer-to-Farmer
	6:00	Depart Kentucky for Wisconsin

11

VIRGINIA - SANTA CATARINA, BRAZIL

BACKGROUND

Virginia and Santa Catarina are very similar in size and population. In both states, agriculture is one of the major industries with each producing swine, poultry, corn andsoybeans as well as coal mining, fisheries and handicrafts.

Santa Catarina is one of 19 Partners chapters in Brazil. Partnered with Virginia since 1967, it has between 50 and 60 members working on 10 subcommittees; health, citizen participation, emergency preparedness, agriculture, university linkages, natural resources, culture, industry and commerce, special education and tourism.

In addition to Florianopolis, there are four cities that have committees in Santa Catarina; Joinville, Blumenau, Tubarao and a new chapter in Lages, which is being initiated with support from Farmer-to-Farmer. Office space, utilities and some secretarial time is donated by the local state government civil defense office.

The Virginia chapter has between 90 and 95 members. They have no fixed office space, working out of the house of the Executive Director. Nine program committees plan for the exchanges in agriculture/rural youth, arts/culture/sports, business/industry/tourism, emergency preparedness, health, special education, technology, university linkages and youth exchanges.

ABCA

A regional office in Brazilia was created in 1986 to support the network of Brazilian partners. ABCA (the Brazilian Association of Partners of the Americas) is a legally registered NGO in Brazil. ABCA's stated purposes are partnership development, support to seminars and workshops and promotion of institutional linkages.

USAID/Brasilia

The overall priorities for the USAID program in Brazil focus on the environment, family planning, AIDS, at-risk youth, democracy (including NGO strengthening), and sustained economic growth. ABCA

works with the USAID Mission to organize and carry out seminars and workshops in these areas.

PARTNERSHIP DEVELOPMENT

Technical Assistance and Training to Partnerships

Findings

ABCA

The Santa Catarina chapter has limited contact with the ABCA office and does not count on them for chapter support. Santa Catarina receives a monthly report but does not see that ABCA has the resources to provide support to them except as an organizer of training functions. From time to time ABCA is able to sponsor candidates from different chapters at certain training events that they organize.

Training

Santa Catarina participated in the CA-sponsored Partnership Development and Evaluation seminar held in Sao Paulo in 1994. Two participants from Virginia participated. After the conference, they traveled to Florinaopolis for partnership planning, a Board meeting and a full meeting with all the members.

Both chapters agree that the impact of the workshop and subsequent visit to Santa Catarina was beneficial. The workshop provided an important opportunity to network between the southern chapters and the northern chapters as well as to learn more about POA programs. The meetings in Santa Catarina provided a sense of rejuvenation among both chapters. The rechartering process was reviewed and each chapter increased their sense of common goals through the long range planning process. The only criticism was that language was a barrier (English at the workshop and Portuguese in Santa Catarina).

The Sao Paulo workshop was particularly significant to Santa Catarina. A volunteer, participating for the first time at a POA event, attended the meeting and returned to start and chair the Democratic Initiatives sub-committee. He has become very active and committed to the development of this program.

2

In April 1995, the Santa Catarina President attended the President and Executive Directors training in Washington. Eventhough he had been on the Santa Catarina Board for 6 years, (4 years as vice president and 2 years as President) he learned many new details about POA with regards to fundraising, organized planning, the organizational vision, and how to be an effective executive director. After this training he spent a week in Virginia finalizing the biennial plan.

Since returning from this training, the President has been very motivated and in addition to completing the revision of the by-laws, he has begun a membership registration drive. After identifying all of the persons who have collaborated with Santa Catarina since 1985, he is compiling a list and sending out invitation letters explaining how the organization has changed and enumerating different membership options. He hopes to have a new membership list and meeting by the end of the year.

In addition to providing the opportunity for face-to-face meetings with Virginia partners, at the Board meeting a decision was made to redo the by-laws. This is the currrent focus of the President and has proved valuable to him in understanding and applying the concept of citizen participation.

Fundraising/Dues

Beyond dues and limited in-kind donations, neither chapter has an active fundraising strategy.

Effective Communication Between POA and the Partnerships

Santa Catarina receives mail from POA International Headquarters at least twice a week about specific programs and general Partners information. The materials receives are good quality and very useful. The chapter is hooked up to e-mail through the Federal University. Various members of the Virginia executive committee are also hooked up by e-mail. There is weekly communication between the chapters and POA by e-mail and telephone (for more urgent matters).

PROGRAMS

Technical Assistance from Partnership Volunteers in support of Priority Activities

The CA funded the airfare for two travel grants in agriculture and project/partnership development. One southern partner traveled north (agriculture) and one northern partner traveled south (program/project development). Further funds were provided for some related costs for five trips; one in agriculture, one in emergency preparedness and three in project/partnership development.

Findings

Additional technical assistance trips in AIDS education, forestry management, and university linkages were carried out with other sources of funding. While these trips were not paid for by the CA, they make an important contribution to partnership development. New volunteers are involved, new programmatic areas and programs are developed, in-kind funds are raised and other funding opportunities arise.

Virginia-Santa Catarina have also carried out business exchanges. Grocery store executives traveled to Virginia paying for their own travel. The trip was organized by the Virginia chapter. Santa Catarina would like to carry out more business exchanges and the executives are apparently willing to pay all the costs (including organizing the exchange in Virginia). Much work was involved and this may provide a future opportunity for fee for service activities for the partnership.

The Virginia chapter is concerned about measuring program impact. They are in the process of discussing the possibility of designing a small project to collect information on their past projects. At present, program impact is anecdotal and if specific information is needed it can be gathered by reviewing reports.

Small Grants for Community Development

The partnership did not receive any small grant through the CA. In general, the partnership does not differentiate the source of their funding requests. They send a request to POA and are not attentive to where the ultimate funding comes from.

4

Additional Comments

<u>AIDS Prevention and Treatment</u>

An afternoon was spent with Maria Helena Westrupp visiting the AIDS program at the Nereu Ramos Hospital and FACA, an NGO working with family and AIDS patients in Florianopolis. Marie Helena and a nurse educator traveled to Virginia in March 1995 to observe AIDS prevention and treatment programs throughout the state. Marie Helena's travel was funded by POA and the nurse educator's expenses where shared by her and the Federal University of Santa Catarina. The trip gave them the opportunity to analyze what they were doing in Brazil through what they saw in Virginia. They were exposed to many educative materials and services for AIDS patients. They were particularly interested in the bioethics of AIDS and have organized a group to study the issue and propose appropriate legislation in Congress. Partner notification is also an area identified in the U.S. that warrantsfor further investigation in Santa Catarina.

<u>Joinville</u>

While in Santa Catarina, the evaluator traveled to Joinville to visit the committee and learn about the drug prevention and Seeds programs. Joinville is a small, active committee of 33 volunteers. They do not collect annual dues but raise money for specific activities as the need arises.

The Joinville committee worked closely with a Kellogg Fellow to develop a drug prevention program for middle school students based on a peer helper model. The Department of Education was very supportive and two of their staff members are on the Joinville Partners executive committee. The Peer Helper program worked with teachers to improve the curriculum, translate training materials, develop baseline data and train teachers and student leaders. Measuring the impact of the training was a major focus. After one day talking with students, teachers and volunteers, it appears that the program was very successful. Due to limited funding, most of the major training activities have been discontinued but teachers report on-going use of the curriculum.

<u>USAID</u>

The evaluator interviewed Ricardo Falcao, the USAID Senior

5

Training Officer in Brasilia, by telephone. He has been working with USAID since 1992 and has had extensive contact with ABCA. He has limited contact with individual chapters. He verified the nascent and relatively weak NGO community that exists in Brazil. He believes there is a large market in Brazil to provide training to the NGO community. He also thought that NGOs should organize umbrella organizations by state. He considers that ABCA is well placed to serve this potential market.

With regards to specific chapters, he commented that many chapters are too dependent on one person for their leadership.

Conclusions and Recommendations

Training opportunties should be open to all members whenever possible instead of concentrated on one or two volunteers.

Each chapter carries out an orientation for all travelers before their trip. These orientations should include all travelers, even those not being funded by POA. Traveleres are participating on a POA-organized trip and will be representing the POA partnership. They need to have the appropriate background information. Feedback should also be provided when trip reports are completed.

Each chapter requested training in grant writing and fundraising. Additional training is needed in Santa Catarina to inculcate the idea of fee for service activities.

Brazilian chapters need to work together. If the existing ABCA infrastructure is not serving their needs, they need to take the initiative and change the situation. One area that needs to be clarified is the tax status of the Brazilian chapters.

A percentage of time of an ABCA staffperson or consultant should be dedicated to marketing fee for service initiatives. If ABCA is to really serve the Brazilian chapters than the income created by these ventures should go towards partnership development activities.

QUESTIONNAIRE RESPONSES

This partnership is very happy with their relationship with

POA. There is constant communication and exchange of information and the staff is accessible and responsive. Both chapters recognize that the relationship between the chapters can sometimes be difficult and the partnership representative plays an important role in balancing perspectives.

When asked what they would like to change, the Virginia chapter mentioned that they would like to have more access to information (such as the database) through electronic communications to be able to search for project information from other partnerships. They also commented that the travel agency used in Washington did not always have the best airfares or connections since they book exclusively with American Airlines.

The partnership felt that the CA-supported rechartering process was very positive and motivating and helped them to focus on their partnership weaknesses. They identified their weaknesses as the lack of operational funding and fundraising and too much diversity in their activities.

Each chapter was asked if they thought that the dues paid to POA ($100 per year) should be raised. While everyone agreed that it would be reasonable to raise the dues, perhaps to as much as $500 per year, they were not sure where they would get the money to pay an increase.

Hands-on, applied training in grant writing and membership development was reqeusted.

PERSONS MET

<u>Brazil</u>

Eduardo Amaroa, Partners/Santa Catarina, Natural Resources
Eliza Berger Coelho, School of Public Health, Florianopolis
Maria Helena Bittencourt Westrupp, Partners/Santa Catarina, AIDS
Aldo Brito, Partners/Santa Catarina, Civic Education
Airton De Oliveira, Vice President, Partners/Santa Catarina
Ricardo Falcao, Senior Training Officer, USAID/Brazilia (by telephone)
Dr. Sid Gomes, Hospital Nereu Ramos
Silvane Kunde, Partners/Joinville
Jose Maria Melim, Partners/Joinville

Silvana Pohl, Partners/Joinville
Elmer Ponte, Partners/Brazil (by telephone)
Tania Mara de Silva Reis, Partners/Joinville
Dr. Aguiles Santos, Executive Director, Partners/Santa Catarina
Maria Patricio Zuleica, Nurse Educator

Virginia

Patricia Brown, Executive Director
Steve Campbell, ex-President and ex-Executive Director
Nancy Eck, Partners volunteer
Sandra Hodge, ex-President and ex-Executive Director

SCHEDULE

Brazil

Sunday, July 16		Arrive Florianopolis
		Dinner with Dr. Santos
Monday, July 17	1:30	Visit AIDS Project, Public Health School and Faca
	7:00	Dinner with Board members
Tuesday, July 18	8:00	Travel to Joinville
Wednesay, July 19	10:00	Meeting with Aldo Brito, Civic Education
	12:00	Lunch with Dr. Santos
	2:00	Meeting with Eduardo Amaroa, Natural Resources
	6:00	Depart Florianopolis for Nicaragua

Virginia

8

Friday, July 28   10:00   Meeting with Steve
                                                 Campbell and Sandra
                                                 Hodge, University of
                                                 V i r g i n i a ,
                                                 Charlottesville

                                       12:30   Lunch meeting with
                                                 Steve   Campbell,
                                                 Sandra   Hodge and
                                                 Nancy Eck

                                        6:00   Dinner with Sandra
                                                 Hodge

Saturday, July 29   10:00   Meeting   with Pat
                                                 Brown in Richmond

WISCONSIN-NICARAGUA PARTNERSHIP

BACKGROUND

Founded in 1964, the Wisconsin-Nicaragua partnership is amongst the oldest. Today, the Partnership is made up of 16 cities/chapters, each of which is partnered to a Wisconsin-Nicaragua city. There are more than 200 members in Nicaragua and 100 in Wisconsin. Each chapter works in sub-committess to plan, develop and implement projects. However, because many of the cities are small and there are not many members, activities are carried out with the participation of most members and the sub-committee structure is less relevant.

The Nicaragua National Committee is located in Managua in a small building loaned by the government. Local chapters are asked to contribute about US$14 a month to the National Chapter to pay for water and electricity, mailings, and a night guard. The Wisconsin State Committee is located at Stevens Point. The University of Wisconsin at Stevens Point has donated office space to the Executive Director during the past two years and has facilitated communications and administrative matters. Since 1995, the office has been paying a nominal rent.

The programmatic areas where activities are most commonly carried out are Farmer-to-Farmer, emergency preparedness, civic education, health, leadership training and tourism. In June 1995, USAID/Managua approved a $677,000 grant to POA in maternal/child health for Rivas. POA will be responsible for overall grant implementation, project management, financial accountability and project reporting. Implementation of the project will be subcontracted by POA to the Wisconsin-Nicaragua Partners. The Nicaragua/Wisconsin partnership has previously implemented USAID/Managua grants.

COOPERATIVE AGREEMENT IMPACT

PARTNERSHIP DEVELOPMENT

Wisconsin-Nicaragua were among the first partnerships to complete the rechartering process. It proved very helpful since much of the same information was required by USAID/Managua for the Maternal/Child Health (MCH) grant.

Technical Assistance and Training to Partnerships

In 1992, POA sponsored a Partnership Development and Project Planning Workshop for the U.S.-Central America Partnerships in Panama. The three-day agenda included a review of the Excellence program, program and project development, a programmatic overview of democratic initiatives, potential resources in the region and site visits. Thirty participants attended, 13 from northern partnerships and 17 from southern partnerships. Only Belize did not have a northern partner in attendance.

Findings

In 1992 and 1993, the Wisconsin-Nicaragua partners undertook an extensive strategic planning activity. With a combination of travel grants and small grants funded from the cooperative agreement, the partnership worked with facilitators in Nicaragua and later in Wisconsin to develop a multiyear plan.

In August 1992, the CA sponsored a regional long range planning and evaluation workshop in Panama for the Central American partnerships. The Executive Director from Nicaragua attended with the President of the Rivas committee. The President and Executive Director from Wisconsin also attended. This meeting confirmed the need for a strategic planning workshop for the partnership. It also consolidated the Healing the Children program and civic education projects. For the President of the Rivas chapter, this was her first exposure to POA on an international level. Today she is President of the National Committee.

The Nicaragua-Wisconsin partner city program creates an added challenge for the partnership. City programs work in an independent manner and do not always remember to inform the national committee (in the case of Nicaragua) or the state committee (in the case of Wisconsin) about their activities. Of the 16 committees, all except two committees are behind on their dues, some as much as one year. Through informal discussions with committees, there is a mild resentment about paying dues to the National Committee. The feeling is that the National Committee should do their own fundraising to cover administrative costs as many of the city chapters do to cover their costs.

In Nicaragua, a monthly meeting of the cities has been the way

2

to exchange information about the committees. In Wisconsin, there are quarterly full member meeting and monthly Executive Committee meetings.

There is some concern in Nicaragua that some travelers from Wisconsin have come, done a great job, created expectations and then were never heard from again. USAID/Managua commented that not all the travelers were the most appropriate for the task that they came down to do.

Effective Communication between POA and Partnerships

The Nicaragua Committee has electronic mail which links them to POA headquaters in Washington and to Wisconsin. In addition, many of the Partner cities have fax machines and communication is frequent. Wisconsin publishes a quarterly, bilingual newsletter.

PROGRAMS

Technical Assistance from Partnership Volunteers in Support of Priority Activities

Through the investment of $2,700, the cooperative agreement was able to support travel from Wisconsin to Nicaragua to design the USAID-funded Maternal/Child Health Project. The Wisconsin Executive Committee designated additional resources towards the completion of the proposal. The project addressess one of the Mission's strategic objectives of providing better healthcare and was ultimately funded.

Small Grants

Through two small grants, one for $4,000 and one for $3,190, the Stevens Point-Esteli partner cities carried out a three phase strategic planning workshop in late 1992 and early 1993. A workshop in Stevens Point brought together 37 participants and a workshop in Esteli had 33 participants with representatives from each chapter in attendance at both workshops. Three fellows also attended. The workshops were facilitated by the Institute of Cultural Affairs in Chicago and Guatemala.

The objectives of the workshops were project development, the establishment of more effective communications and developing

3

69'

common goals. The immediate impact of this strategic planning include:

- The city of Esteli and Stevens Point opened the Stevens Point Esteli English Academic Center (SPEEAC) in Esteli in 1993. Accredited by the Ministry of Education, the first activity was to train all English teachers in the town. The school is staffed by two volunteer teachers from Wisconsin during the school year. At present there are difficulties locating appropriate volunteer teachers for the 95-96 school year;

- Each committee increased their effective membership;

- Stevens Point is publishing a newsletter;

- Stevens Point produced a video that included an interview of the President of the Esteli committee;

- Esteli sent a video to Stevens Point about their city, culture and SPEEAC; and

- Establishment of communication between the partner cities by fax (e-mail is almost complete).

Additional Comments

USAID

The USAID/Managua strategic objectives include democratic initiatives, production and employment generation and healthier, smaller families. With the award of the MCH grant, POA is contributing to the strategic objective of healthier families. During a meeting with USAID, the institutional sustainability of the national chapter was discussed. A.I.D.'s concern is that an institutional structure and capacity be left in place when this project is finished, particularly on-going funding mechanisms. Nicaragua partners is perceived as having good intentions but little development experience.

Second Generation Leadership

During the summer of 1995 eleven youth from Wisconsin traveled

to Nicaragua for three weeks and returned to Wisconsin with eleven Nicaraguan youth for three weeks. The theme of the exchange was the environment and it was partially funded by Wisconsin companies. Consolidated Papers donated $10,000 and Johnson's Wax donated $3,500. In addition, partner cities raised almost $6,000 and a seed grant from POA contributed almost $5,000. This was an initiative undertaken by the leadership of Wisconsin partners and is an outstanding example of fundraising from the private sector in Wisconsin.

Conclusions and Recommendations

The MCH grant is an opportunity for Partners to establish their presence in the NGO health sector in Nicaragua. Qualified and motivated staff are essential to the management and success of this grant. At the same time, additional funding sources need to be identified and targeted to provide future resources to the chapter and develop Partners as an NGO leader in Child Survival in Nicaragua.

A remarkable infrastucture exists in Nicaragua. EPP funds a program administrator who also handles many partners functions. An small office building has been made available at no expense. However, no visible effort has been made to raise program funds beyond USAID. During the last five years, many funders have been in Nicaragua looking for programs to fund. Neither the National nor the city committees have taken advantage of these opportunities. According to the Executive Director, the relationship to the U.S. partner is a hinderance because the assumption is that the local chapter must already have funds. There is a lack of initiative to take advantage of the funding opportunities available in Nicaragua. Individual chapters have been successful in their humanitarian projects such as Healing the Children.

The entrepreneurial mentality needs to be stimulated. There is a dependence on International headquarters and Wisconsin for program funds. Institutional sustainability is an issue for USAID/Managua and for the growth and long-term sustainability of the Partners as a local NGO, volunteers and staff need to have the vision and capacity to move the chapter towards this end. Depending on POA and Wisconsin to meet funding needs will never lead to a strong program. There will be only limited resources for a few activities.

For the above reasons, a change in the southern leadership is required. Opportunities are not being pursued. A dynamic, entrepreneurial spirit, willing to take on new challenges of program development and institutional sustainability is long overdue. The northern leadership has recently had a successful record at raising funds from the private sector. This initiative should continue and be supported in whatever way possible.

Strategies need to be developed so that all resources invested in travelers have an impact. Orienation is important so that volunteers do not offer more than they can respond to. Travelers should be encouraged to stay involved in the partnerhsip upon returning from their trip.

QUESTIONNAIRE RESPONSES

The partnership likes the backstopping they receive from international headquarters. They feel they have an honest relationship and can say what they want. They also think the partnership representative is responsive and sharing. Wisconsin would like more recognition since they feel they are expected to do a lot and their volunteer status is not appreciated enough. Nicaragua would like Wisconsin and international headquarters to accept collect calls.

The northern chapter would like some training directed specifically at U.S. chapters. This would include project development and sustainability. They would also like to see the President/Executive Director workshop available to a wider range of persons. Nicaragua would like training in fundraising, drug prevention and AIDS education.

When asked if the dues paid to POA should be raised, both chapters hesitated but answered yes. The membership is worth more than $100 and they believe they would be able to raise the money through the membership. However, the Wisconsin representatives said they would like more transperancy in the POA budget, particularly details on POA headquarters spending and salaries.

Wisconsin sees its strengths in the partner city network and diversity of membership and its weaknesses in the lack of administrative funds and the use of volunteers who have a vast potential but never enough time. In the south the strength is also

6

perceived as the partner cities and the weakness as the lack of sports programs.

Persons Met

<u>Wisconsin</u>

Sherrin Bowen, Executive Director
Doug Brethauer, Executive Committee
Tony Jelick (by telephone), Executive Committee
Dr. Brad Martin, Executive Committee
Dr. Julie Martin, Healing the Children
Bob Nellis, President
Bob Stodola, Treasurer

<u>Nicaragua</u>

José Canton, Executive Director
Norma Granja, Rivas
Leonor Guerrero, Emergency Preparedness
Hector Lacayo, Rivas
Auxiliador Lopez, Rivas
Padre Alfonso Alvarado Lugo, Rivas
Graciela Paéz, Rivas
Fredman Perez, Estelí
Dina Sandoval, Rivas
Virginia Torres de Rivera, Rivas
Arelis de Vita, President, Matagalpa

SCHEDULE

<u>Nicaragua</u>

Thursday, July 20	12:00	Arrive Managua
	1:00	Lunch meeting with city committees
	4:00	Visit POA office
Friday, July 21	8:00	All day trip to Rivas

Saturday, July 22		1:00	Depart Nicaragua

<u>Stevens Point, Wisconsin</u>

Tuesday, July 25	9:30	PM	Arrival
Wednesday, July 26	10:00		Meeting with Sherrin Bowen
	3:00		Meeting with Executive Committee
	6:30		Dinner with Executive Commitee
Thursday, July 27	7:00		Depart Wisconsin